



2025 Cronin Submission Booklet

2025 GEORGE CRONIN AWARDS FOR PROCUREMENT EXCELLENCE SUBMISSIONS

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The Cronin Club

George Cronin Massachusetts 1947	Charles Sullivan New Jersey 1964	Stanley Hanna Maryland 1981	Dugan Petty Alaska 1998	Dean Stotler Delaware 2013-2014
F. Carl Anderson Pennsylvania 1948	Alan Vessey Minnesota 1965	Hugh Carleton Louisiana 1982	David Gragan Texas July-Sept 1999	Deborah Damore Vermont 2015
Franklyn Adams Rhode Island 1949	Francis Brooks Nevada 1966	James Christiansen Utah 1983	Jan Hamik Wisconsin 2000	Paul Mash Utah Jan-March 2016
P.T. Peterson Minnesota 1950	William Finnegan Connecticut 1967	John Spath New York 1984	Joyce Murphy Missouri Sept 2000-May 2001	Larry Maxwell New Mexico April 2016-2018
Frank Free Vermont 1951	Hugh White South Carolina 1968	Jack Pitzer Iowa 1985	Pat Kohler Washington May-Dec 2001	Michael Jones Alabama 2018
William Stevenson Minnesota 1952	John Ayers Washington 1969	Giulio Mazzone New Jersey 1985-1986	Richard Thompson Maine Jan-Mar 2002	Lisa Eason Georgia 2019
Blaine Yoder Nebraska 1953	Thomas Blanco Illinois 1970	Howard White, Jr. Alabama 1987	Denise Lea Louisiana Mar 2002-Sept 2003	George Schutter District of Columbia 2020
John Bush Ohio 1954	John Short Wisconsin 1971	Thomas M. Bostick Georgia 1988	George Street Tennessee 2003-2004	Rosalyn Ingram Florida 2021
J. Stanley Bien Michigan 1955	Ramon Damerell Oregon 1972	Edward J. Erxleben Arkansas 1989	John Adler Arizona 2004-2005	Delbert H. Singleton South Carolina 2022-2023
C.L. Magnuson Connecticut 1956	Frank Pennoni Michigan 1972-73	Wayne A. Casper Arizona 1990	Ellen Phillips Massachusetts 2005-2006	Valerie Bollinger Idaho 2024
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John Dyer Maine 1959	Herman Crystal New Jersey 1976	Paula Moskowitz New York 1993	Vern Jones Alaska 2008-2009	
Lacy Wilkinson Colorado 1960	John Fisher, Jr. Tennessee 1977	N. Kent Rose Alabama 1994	Dianne Lancaster Oregon 2009-2010	
Franklin Pierce Tennessee 1961	John Hittinger Florida 1978	Douglas G. Richins Utah 1995	Greg Smith Nevada 2010-2011	
E. Guy Martin Louisiana 1962	Homer Forester Texas 1979	Richard B. Thompson Maine 1996	Ron Bell Virginia 2011-2012	
Henry Knouft Kansas 1963	E.R. (Bud) Roon Colorado 1980	Donald G. Buffum Mississippi 1997	Carol Wilson Connecticut 2012-2013	

Past Gold Cronin Winners

2024 - Michigan Cloudy with a Chance of Savings: Infrastructure as a Service	2009 – Oregon Information Technology Managed Service Provider for Hourly and Project-Based Services	2000 – Utah Vehicle Purchase Program
2023 - Michigan Lifecycle Supplier Outreach & Relationship Management	2008 – Ohio Multi-State Procurement of Unique Services	1999 – Ohio Natural Gas Purchasing Program
2022 - Michigan Competitive Proof of Concept: Trying Before You Buy While Complying with Competitive Requirements	2007 – Minnesota Spend Analysis System	1998 – Missouri PC Prime Vendor Contract
2021 - Wisconsin Interagency, Data-Driven Collaboration: Wisconsin's Innovative Approach to Specification Development	2006 – New York Hazardous Incident Response Equipment (HIRE)	1997 – Wisconsin Advantis Credit Bureau Access Program
2020-None Selected	2006 – Hawaii (IT) Compliance Express Program	1996 – North Carolina Micro-Computer & Peripherals Contract as Developed & Managed on the Internet
2019 - Michigan Circumventing Risk with Contract Management	2005 – Massachusetts (Classic) Envirocalc: Environmental Benefits & Energy Cost Savings Calculator for Purchasers	1995 – 1994 None Selected
2018 - Alaska Continuous Improvement in Statewide Procurement	2005 – Washington (IT) WEBS: Washington Electronic Business Solution	1993 – Minnesota Document Management System
2017 - Utah ValuePoint Cloud Solutions Procurement	2004 – Illinois (Classic) Transformation of Procurement Performance	1992 – Oregon Vendor Information Program
2016 - Tennessee Radio Equipment and Services	2004 – Arizona (IT) SPIRIT: Automated eProcurement System	1991 – Arizona Contract for Abatement of Underground Storage Tanks
2015 - Tennessee Tourist Development – Marketing and Advertising	2003 – Connecticut (Classic) Weekly Information Newsletter	1990 – New York Contract for Electronic Ballasts
2014 - Virginia eVA Mobile Apps	2003 – Virginia (IT) eVA Electronic Procurement Solution	1989 – Missouri Pharmacy Service Contract for Correctional Facilities
2013 - Mississippi Driving Efficiency into Business Operations	2002 – Alaska Long Distance Learning	1988 – Kansas Freight Management Systems
2012- Oregon Direct Dealership Price Agreements	2001 – Idaho Purchasing Modernization Initiative	1987 – West Virginia Natural Gas Contract
2011 - Oregon Nationwide Lodging Services		1986 – Alaska Video - "A Better Way To Buy"
2010 – Minnesota & Wisconsin Partnership Initiative		1985 – Missouri Competitive Bidding of Residential Rehabilitation Services



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State of Florida

Department of *Management Services*
Division of State Purchasing

2025 George Cronin Awards for Procurement Excellence

Supplier Engagement

Executive Summary

The State of Florida Division of State Purchasing established a strategic approach to the contract management process with the intent to build stronger supplier relationships, enhance industry awareness, and ensure continuous improvement at the statewide contract level. At the core of this innovation is a documented structure for virtual business review meetings (BRMs) and on-site visits with Florida-based suppliers designed to build strong professional relationships, gain real-time operational insight, and anticipate industry shifts or emerging risks.

By implementing structured meetings and on-site evaluations into the contract lifecycle, we have enhanced our compliance framework with proactive monitoring and real-time oversight. This strengthened approach ensures adherence to contract terms while enabling collaborative problem-solving and supports a culture of accountability and continuous service improvement.

This model is not only effective, but highly transferable. Agencies and other governmental entities can implement our approach using standardized yet flexible tools, including a BRM agenda template, a site visit agenda protocol, and a supplier performance dashboard. These resources streamline implementation while allowing for customization based on contract type and need.

Additionally, through consistent, structured interactions with suppliers, our team has fostered continued professional growth and developed subject matter expertise in key industry areas. These insights have enhanced our ability to make informed decisions, elevate procurement strategies, and anticipate changes in a rapidly evolving landscape.

Through this submission, we showcase how transforming contract management from a transactional task into a strategic, partnership-driven model creates long-term value, advances procurement excellence, and upholds the highest standards of compliance, accountability, and stakeholder impact.

Innovation

Faced with the complexity of managing 1,092 supplier agreements across a broad range of industries and service types, the State of Florida recognized the need to move beyond traditional, transactional oversight. In response, we implemented a forward-thinking, engagement-centered contract management process that brings structure, accountability, and relationship building to the forefront of procurement operations.

At the heart of this model is a recurring cycle of virtual business review meetings and on-site supplier visits, embedded as strategic touchpoints throughout the contract lifecycle. These interactions serve not only as monitoring tools but also as collaborative forums for strengthening partnerships and sharing critical operational insights.

The contract management team recognized a need for more supplier interaction, conversations, and accountability. The team implemented several tools to help fulfill this need. We partnered with Procurated to implement an online supplier review system for our customers, which is embedded into our customer-facing contracts webpage. This system allows our customers an additional way to provide feedback so we can work with suppliers, if necessary, for any issues identified. The customer service team also began scheduling more BRMs as an onboarding tool for new suppliers. This meeting is beneficial to set expectations and answer any questions. During this meeting, a representative from Procurated also walks the suppliers through the review system so that suppliers understand how they may be reviewed. This review meeting occurs after any contract has been executed. We also meet with suppliers, virtually or in person, when requested or if we need to address any compliance or training needs. The team also began supplier site visits. When scheduling on-site visits, the team identifies a location within Florida to travel and selects suppliers whose offices are in that area to visit. We look



first to visit suppliers who may need additional guidance or fall under a portfolio or industry that may be seeing supply or cost challenges. While there, we tour facilities, discuss the contract, and talk through successes and opportunities. This has been very helpful to have open discussions with our supplier partners on supply chain, tariffs, and industry challenges. For the 2024 calendar year, the Bureau of Contract Management held 310 business review meetings and 29 supplier site visits. We intend to double these numbers for 2025.

Through this innovative framework, contract management teams are empowered to:

- Build trust and transparency with suppliers through direct, consistent communication.
- Identify performance gaps and emerging risks early, before they escalate into formal disputes.
- Foster supplier responsiveness and accountability by encouraging open dialogue and shared ownership of outcomes.
- Stay informed on industry trends, supply chain impacts, and evolving market conditions, allowing for more strategic procurement planning.

This model has fundamentally changed the way we manage contracts. Rather than relying solely on document reviews, we now engage suppliers in real-time, gathering insights, solving problems collaboratively, and addressing concerns at the source. This shift enables a more agile, responsive contract management process that is continuously informed by data and relationship feedback loops.

By embedding structured, recurring engagements into our oversight approach, we've transformed contract management from a static, compliance-only function into a dynamic, intelligence-driven process resulting in stronger supplier relationships, improved service delivery, and more resilient contract outcomes.

Transferability

Our model can be readily replicated by other agencies and governmental entities. The core components include:

- A template-based BRM agenda, customized by contract type.
- A site visit agenda, outlining communication, and evaluation standards.
- A supplier performance dashboard used to document, track, and review supplier progress.

These tools are standardized but flexible; they can be applied by other agencies regardless of contract size, type, or complexity. Whether managing information technology (IT) services, facilities operations, or professional staffing contracts, the model can be tailored to reflect specific service expectations, compliance requirements, or operational nuances.

In short, this framework offers a scalable, replicable solution for agencies seeking to modernize their contract management practices, build stronger supplier relationships, and improve performance oversight regardless of agency size or focus area.

Service Improvement

The implementation of our contract engagement model has resulted in tangible improvements in service delivery, supplier accountability, and operational alignment. By embedding consistent, structured communication into every stage of the contract lifecycle, our teams have fostered a culture of continuous performance enhancement.

Key improvements include:

- Increased supplier responsiveness and collaboration:



Regular touchpoints through business review meetings and site visits have created open channels for communication. Suppliers are more engaged, responsive, and willing to collaborate on solutions, resulting in timely service delivery and improved issue resolution.

- **Proactive problem solving and reduced service disruptions:**
By identifying performance issues early, our teams can initiate corrective actions before problems escalate. This has helped minimize service interruptions, protect critical operations, and improve overall contract stability.
- **Improved clarity and alignment on expectations:**
The consistent use of shared agendas and performance dashboards has helped establish mutual understanding of contract requirements, key performance indicators, and agency priorities. This transparency promotes accountability and trust, while reducing miscommunication or ambiguity in supplier obligations.
- **Enhanced decision making and contract evaluation:**
Contract managers now have access to real-time performance data and qualitative insights from supplier interactions. This enables more accurate assessments of contract effectiveness and ensures that service delivery aligns with evolving agency needs and strategic goals.

In addition to structured oversight, our model also emphasizes long-term relationship building and supplier empowerment. Suppliers are encouraged to provide feedback during BRMs, promoting two-way communication and mutual understanding. High-performing suppliers are recognized during these engagements, reinforcing excellence and encouraging continuous improvement across our provider network. To support alignment from the start, we also provide onboarding resources and performance expectations to ensure suppliers are well equipped to meet their contractual obligations. These efforts have strengthened supplier trust, improved contract outcomes, and fostered a more collaborative engagement model.

These improvements underscore the effectiveness of our model not just as a compliance tool, but as a driver of quality, efficiency, and supplier accountability. The combination of structured engagement, transparent communication, and performance tracking has fundamentally strengthened our service outcomes.

Savings & Efficiency

Our collaborative contract management model has delivered measurable improvements by fostering a more intentional, proactive, and streamlined approach to supplier oversight.

- **Improved resource allocation:**
By reducing time spent resolving repeated supplier issues, contract managers now dedicate more of their time to supplier development and contract performance monitoring. In many cases, what previously took multiple follow-up emails and escalations is now resolved through a single business review meeting.
- **Enhanced service delivery:**
Regular supplier touchpoints and early risk identification have helped ensure consistent service performance. For example, suppliers have updated internal tracking systems and improved reporting timeliness after issues were flagged during quarterly reviews.
- **Reduced administrative burden:**
Standardized templates for reporting, compliance documentation, and BRMs have eliminated inconsistent practices and introduced structured procedures. Contract managers report fewer delays chasing suppliers for missing information and greater consistency in how contract files are documented.



- **Faster issue resolution:**
Recurring BRMs provide a structured forum to identify, track, and address performance concerns in real time. As a result, resolution timelines have improved, issues that once remained open for weeks are now commonly addressed within a matter of days, reducing disruption and improving accountability.
- **Closer alignment with agency priorities:**
This model allows procurement staff to directly link supplier performance to key agency goals, such as enhancing customer satisfaction and ensuring consistent service delivery. Ongoing supplier engagement creates opportunities to develop solutions that address both contract obligations and the evolving needs of agencies.

This model has enhanced contract oversight by improving efficiency, increasing operational stability, and equipping teams to manage contracts with greater confidence and consistency.

Conclusion

The State of Florida has transformed contract management into a strategic, relationship centered function that enhances compliance, strengthens supplier accountability, and drives long-term value. Through structured business review meetings, on-site visits, and adaptable tools, we've improved service delivery, reduced risk, and created a scalable model for procurement excellence. This approach delivers measurable results while supporting agencies, suppliers, and the communities we serve.





Commonwealth of Massachusetts

Operational Services Division (OSD)
Category Management

2025 George Cronin

Awards for Procurement Excellence

Improving Supplier Relationship Management with Multi-Supplier Business Reviews

Executive Summary

In 2024, the Operational Services Division's (OSD) Category Management unit conducted a review of its supplier business review (BR) process with the goal of improving its overall approach to supplier relationship management. The review identified several shortcomings associated with the then-current BR process:

1. A total of thirty-six (36) individual supplier BRs were conducted each fiscal year, amounting to less than 5% of contracted suppliers.
2. The low frequency of BRs provided insufficient opportunities for Category Management to formally interact with vendor partners. These interactions are critical to ensure supplier compliance with key performance indicators (KPIs) and contract terms, share feedback received from buyers, and discuss industry and contract challenges and opportunities.
3. BRs did not include ample participation from key stakeholders within and outside of the agency. Such participation is critical to the unit's category management approach to managing statewide contracts.
4. The team's bandwidth did not allow for increased frequency of individual supplier BRs.

With the challenge clearly identified, the team brainstormed, researched and then designed and proposed a new and innovative approach to BRs. The renewed format would see each BR session include multiple suppliers awarded on the same statewide contract, and would ensure participation from unit and agency leadership, as well as internal and external stakeholders. The session, hosted by one or more Category Managers, would present sales and compliance data across all awarded suppliers on that contract, and would provide attending suppliers with indicators of their performance and feedback relative to other suppliers on contract. A major focus of the session would be reserved for an industry discussion among all attendees surrounding relevant industry topics submitted by Category Managers, key stakeholders, and suppliers.

The team completed its design of the template presentation materials for each BR, as well as an accompanying process document to drive Category Managers' preparation for each session, in advance of the formal launch of the new approach in July of 2024. In addition, with the help of Procurated's public sector review platform, the team designed a process by which suppliers who are not included in a synchronous review would still receive performance and compliance data in an asynchronous format. This would enable close to 100% of suppliers on selected contracts to be reached either synchronously or asynchronously.

For the fiscal year ending June 30, 2025, utilizing this new approach, the Category Management unit will have conducted a synchronous BR session with at least 269 suppliers, or close to a third of total contracted suppliers. In addition, virtually all non-attending vendors for the selected contracts will have received an asynchronous review.

Outside of the significant increase in annual supplier touchpoints, the new approach to BRs represented a more comprehensive approach to supplier relationship management for OSD's Category Management team. Each BR session sparked thoughtful discussion among vendors and attendees that category teams can use to improve category offerings in accordance with buyer needs and industry trends. Sessions also allowed category teams to resolve outstanding issues with current contracts, contemplate additional buyer and vendor training needs, and incorporate participation and feedback from multiple stakeholder groups.

Innovation

The Commonwealth's approach to supplier BRs is a significant and groundbreaking departure from the one-to-one approach employed by most procurement teams across all sectors, industries and States. Typically, due to bandwidth of many teams, one-to-one BRs are established only with suppliers of strategic importance, a limitation that enables such vendors to drive decision-making while allowing few opportunities for smaller, less strategic firms to exchange feedback with the team.

The Commonwealth's innovative, multi-supplier approach addresses these limitations head-on. If executed well, the inclusion of a diverse group of suppliers within a single review session serves to benefit both procurement teams and their suppliers and stakeholders in their efforts to build and maintain mutually beneficial long-term relationships.

There are several perspectives that can only be gained from diversity of thought, and this is what the new process has allowed us to be able to do. For each session, we are able to gather feedback through discussions from a variety of vendor categories to include:

- Large firms
- Small businesses
- Diverse businesses
- Businesses with strategic product/service offerings
- Businesses with high sales under contract
- Businesses with no sales under contract
- Vendors who are new to the Commonwealth
- Returning vendors with established relations with the Commonwealth

We have been able to share contract performance, igniting some competition among vendors towards compliance, with positive results. Vendors also share their experiences under the contract - what works and what doesn't work; this creates an environment to problem solve among vendors, for shared ideas about how issues can be dealt with, while providing an opportunity for the category team to innovate in finding solutions for the shared issues.

The category team has also been able to partner with the public sector review company - Procurated, for this process. Through this partnership, we are able to show a live picture of what vendors' performance status is (compared to all other vendors on the contract) from the perspective of the buyers not only in MA but across the country. Through an AI summary review, vendors are able to see what the specific areas of mention are, and are able to address post session, if they have not already done so.

Through this revised process, we have been able to innovate in the areas below. In some instances, we have already added these elements to our processes or contract offerings, in other instances we are in the research/discussion phases for them to be included in the future:

- Artificial Intelligence
- Sustainability and sustainable procurement practices
- Opportunities for contract use in Gateway communities
- Increased partnership with other MA Associations and Consortiums
- Creating additional vendor learning opportunities
- Improved processes around price and product additions on Statewide Contracts



Transferability

Given the innate challenges associated with often insufficiently staffed procurement teams throughout the public sector, even amidst the great need to improve vendor relationship management, the Commonwealth's approach is an effective alternative to the one-to-one Business Review sessions typically employed. In many instances, outside of the inclusion of multiple awarded suppliers within a single session, states may not need to make a significant number of material changes to their current process or templates in order to adopt this approach. Adjustments to presentation templates, as well as thoughtful preparation with suppliers and key stakeholders, should enable states to employ the approach without the need for additional staff or other resources.

The partnership with Procurated is also something that is highly transferable. In fact, there are many other states that already have established relationships with Procurated to provide buyer feedback for their vendors, and would only now need to incorporate them in the BR process in the way that MA has. Procurated could even provide support, through their experience with the MA partnership, in this regard.

In the process redesign, MA used the accessible Microsoft tools - Microsoft Forms, Powerpoint, Teams to create and document the new business review process flow, policy, presentation template, timeline, tracking tool and instructions. This was complimented by already existing data dashboards for data infusion. There were no investments made in add-on tools or software. This makes this process almost seamless from a cost perspective to implement across other states. It simply requires a willingness to put in the preparation hours for a successful session. The learning curve for this process and its materials is fairly short.

The transferability of the approach is certainly the highest for state procurement teams that award statewide contracts to multiple supplier partners.

Service Improvement

The Commonwealth's BR approach relies heavily upon the engagement of internal and external stakeholders, as well as supplier partners. In particular, the industry discussion section of the BR is designed to allow for live collaboration and discussion amongst all attendees. Supplier partners learn about the challenges and opportunities shared by key buyers and other stakeholders, while stakeholders learn more about suppliers' offerings and utilize key findings in their own strategic decision-making.

Further, as stated prior, the approach enabled the Commonwealth to increase the number of suppliers participating in BRs from just 36 in fiscal year 2024 to an anticipated 269 in fiscal year 2025. This datapoint, together with the enhancements to the nature and content of the sessions, clearly demonstrate the approach's ability to improve the important procurement function of supplier relationship management.

Some of the service improvement we have seen in our buying community include:

- Vendors in the vehicle industry making adjustments to respond to regulatory changes
- Ability to ensure consistent supplies in the face of supply chain disruptions
- Support for plastic water bottle ban in the Commonwealth
- Managed AI within the janitorial industry (Autonomous machines) and language translation space
- Metrics for measuring recycled tonnage
- Increased vendor contacts

Savings & Efficiency

While it is difficult to calculate the exact dollar value savings generated by the new approach, we can confirm that there are definitely savings that have been realized. By way of an estimate, we can conduct a comparison between the new and prior approaches using the following assumptions:

- Three (3) hours of preparation and execution of a BR session under either approach
- A goal of 300 participating suppliers in one (1) year under either approach

In the earlier one vendor per BR approach, we would require more than 900 staff hours to meet the indicated targets, something that would not be feasible for any procurement team. The efficiencies that we are looking for in our process, relationship building and contract offerings would not be realized either.

On the contrary, the new, multi-supplier per Br approach requires just over 100 staff hours. This significant delta is attributable to the inclusion of multiple vendors per session. This is not only attainable, but also sustainable. The efficiencies that this process drives are already highlighted earlier in this document.

Conclusion

Massachusetts' innovative measures, including the revised business review process, its associated guideline and supporting documents, have been pivotal in driving efficiencies in our category management team, improving internal processes, honing our industry knowledge, created better and more robust SWCs, and improved our supplier relationship management process.

Through these benefits, OSD sets a precedent for vendor process improvement across the nation. The transferability of this re-designed process opens the door for other states to replicate and adapt these strategies, fostering a broader implication for interstate partnerships and learning. The service improvements and cost savings achieved through this process sets the stage for increased focus on management of vendor relationships, inclusivity, diversity and change.





State of Massachusetts

Operational Services Division
Office of General Counsel

2025 George Cronin

Awards for Procurement Excellence

**Smarter Service, Safer Contracts:
Transforming State Procurement
with Dual AI Agents**

Executive Summary

The Massachusetts Operational Services Division (“OSD”), in collaboration with Northeastern University’s Burnes Center for Social Change and its AI for Impact Lab, launched a groundbreaking dual AI agent initiative to integrate artificial intelligence tools, which improve efficiency, consistency, and accessibility of the Commonwealth’s procurement operations. The initiative introduced **two (2) secure AI-powered tools**: “ABE” (Assisted Buyer Engine), a chatbot agent that provides instant, policy-aligned answers to procurement questions; and “OneL,” a large language model (LLM) that performs preliminary contract reviews to identify conflicts between vendor terms, RFRs and Commonwealth terms. Both tools are available securely and exclusively to OSD and sixty-four (64) MA executive agencies, streamlining communication, improving legal workflows, and supporting compliance activities.

This initiative exemplifies innovation by being the first known deployment of secure **dual** AI agents in a state procurement setting, designed through a public-academic partnership that promotes both impact and public trust. Its modular, open-source architecture makes it readily transferrable to other states. Service delivery has improved through faster, more consistent policy interpretation and more efficient legal review processes. Cost savings and efficiencies are already measurable, with a reduced staff workload and faster turnaround times. Together, these tools position Massachusetts at the forefront of responsible, effective AI adoption in government – setting a gold standard for modern procurement.

Innovation

The Commonwealth of Massachusetts’ deployment of dual AI agents represents a breakthrough in public procurement- not by automating a single task, but by reimaging the entire lifecycle of procurement, support and oversight. Procurement processes often face challenges, including prolonged turnaround times, inconsistencies in contract analysis, and limited access to procurement guidance, largely due to limitations of manual contract review. This initiative is innovative not only in its use of cutting-edge technology, but also in its governance, development approach, and focus on practical, policy-aligned outcomes.

Each AI tool performs a distinct function that addresses specific pain points within procurement, and together they drive the modernization of the procurement process.

The chatbot agent, ABE, (Assisted Buyer Engine) empowers internal staff and other executive agency buyers with instant, consistent and equitable access to procurement guidance- dramatically improving transparency, responsiveness and inclusion, particularly for small agencies with limited support. Unlike static knowledge bases or traditional ticketing systems, the chatbot applies procurement rules, policies, indexes and historical Q&A data to generate dynamic responses that align with OSD specific practices.

Meanwhile, the contract review agent, OneL, powered by a large language model (“LLM”) is addressing one of procurement’s most expensive, complex, and riskiest areas: compliance with our terms and conditions for statewide contracts, particularly IT contracts. This agent identifies conflicting language, flags ambiguous language, creates redlines and suggests preferred language...before vendor responses even reach the legal teams! This not only accelerates the review process but also supports uniformity and early identification of red flags.

Several elements distinguish this project from other AI applications in the public sector: These models are **trained specifically on Massachusetts procurement law**, policies, user guides, templates, and



indexes ensuring the outputs align with regulatory obligations and internal standards. They were **developed through a public-academic partnership** with Northeastern University's Burnes Center for Social Change and its AI for Impact Lab, and unlike many AI tools that rely on external platforms, these tools are also **hosted securely within the Commonwealth's IT environment**. This secure framework safeguards data, minimizes cybersecurity risk and complies with state requirements for data privacy and retention. By limiting access to executive agencies under OSD's procurement purview (64 executive agencies!) the project ensures focused deployment, tighter quality control and better alignment with end-user needs and oversight responsibilities.

What makes this dual deployment truly innovative is the interlocking value: The chatbot provides front end access to procurement and legal guidance while the LLM enhances back-end contract accuracy and risk mitigation. Together they create a self-reinforcing (never leaving the attorney out of the review loop!), streamlined, scalable system that strengthens procurement from initial inquiry to final document execution without increasing staff burden, overhauling systems, or sacrificing legal safeguards.

This initiative reimagines the role of AI in government not as a replacement for human expertise, but as a strategic partner in improving services, efficiencies and compliance in our procurements. Complementary- end to end impact!

Transferability- The Massachusetts model isn't just replicable- it's adaptable!

The dual agent AI system itself is highly replicable and would serve as a scalable, cost-effective template for state governments and other entities. Implementation is practical, as other governments can utilize the open-source base model and then further train it with their own procurement policies, contract templates, and other applicable documents. Advising on procurement questions and flagging potentially conflicting terms for negotiation are common procurement practices across jurisdictions, making the tools easy to integrate into existing processes. Because both Abe and OneL were developed with open-source foundations and scalable infrastructure, these tools require minimal labor costs and specialized resources to implement and adapt.

In addition to its technical adaptability, the dual AI agent initiative introduces a replicable talent pipeline by engaging universities to establish public-academic partnerships for AI development and implementation. This partnership model can be leveraged by other governments and entities when implementing, training, and refining the AI tools according to their specifications.

In short, while this initiative is currently scoped for Massachusetts, these tools were developed with an eye toward broader public sector application. With the appropriate policy and training adjustments the initiative can be adapted by any state interested in responsibly applying AI to strengthen procurement oversight, speed and efficiency. ([see attached for State Dual AI Replication Guide & Cost Breakdown](#))

Service Improvement

The dual AI initiative undertaken by OSD has led to measurable and meaningful improvements in the delivery, accessibility and efficiency of procurement services.

ABE provides instant, policy-aligned responses, 24 hours a day, 7 days a week, to numerous users at once, reducing wait times for answers and ensuring consistency in guidance. Traditionally OSD fields approximately 1000 emails and calls each month, many with recurring, procedural questions. It is expected that in the first 90 days the bot will field 3,000 questions with an 85% satisfaction rating (based on post response feedback surveys and ratings), reducing OSD staff time spent on repetitive inquiries,

reducing the risk of misinformation and freeing OSD personnel for higher value advisory work. Continued tracking will provide valuable data insights as to what users are asking which in turn will guide training and policy improvements. OSD is also exploring future options to improve accessibility using ABE. While ABE naturally helps users with language barriers access plain language support, there are also possibilities to eventually integrate text to speech, translation or screen reader tools.

OneL significantly improves the speed and consistency of initial vendor proposed clarifications. During a 6-week pilot, involving reviews of 20 vendor submissions, OneL was able to flag 93% of the terms that were ultimately identified by legal counsel. This consistency across reviews systematically minimizes human oversight (particularly with lawyers new to procurement and/or Commonwealth terms) and increases recommended standardized language across contracts. Average review time for the clarification documents dropped from approximately 6 hours to under 1 hour per document. These metrics were tracked using internal time-logging systems and qualitative validation by OSD attorneys who reviewed the OneL generated term reports. OSD predicts that the long-term benefits of this consistency will include reducing the number of post award amendments or corrections.

Stakeholder engagement was integral to every phase of development.

The MA Executive Office for Administration and Finance's IT division was a key partner in the development of both AI tools. Their collaboration ensured that both applications complied with statewide cybersecurity, data privacy, and IT infrastructure standards. Furthermore, they are actively exploring ways to expand OneL's use to support executive agencies in negotiating contracts that fall outside the scope of the statewide contracts (something which falls within OSD purview but is currently too voluminous for OSD legal to review for compliance) and to empower agencies to build their own chatbot tools using the foundational framework developed by OSD.

The initiative was shaped and continues to be shaped by a strong change management strategy. OSD shared ABE in the sandbox with procurement leads from several executive agencies to identify recurring questions, policy ambiguities and pain points that could be addressed through automation. Their insights directly informed ABE's scope and language model fine tuning. For example, the original scope did not include the statewide contract index. You could ask ABE, "do I have to buy a pencil on statewide contract" but not "do you have pencils on statewide contract." Stakeholder working groups quickly revealed that a major pain point was often trying to figure out if the good/service you were looking for was available on statewide contract. Expanding ABE's knowledge base incorporated this basic but often time-consuming question into an instantaneous answer. OSD legal counsel also participated in tagging and annotating historical contract terms to help train OneL on what constituted a policy conflict or deviation from standard terms. Together with Category managers they also created an AI friendly response template for vendors ([see attached](#)). This human-in-the-loop approach ensured that the tools were not only technically sound but also grounded in real legal and operational requirements.

OSD is currently developing live demos and in tool explanations to build user confidence and promote proper adoption. This forward-looking approach positions Massachusetts not only to maintain the gains achieved through the current deployment but also to expand the reach and impact of AI across other procurement and legal departments.

Savings & Efficiency

OSD has realized and anticipates measurable cost savings and efficiency improvements through the dual AI deployment of ABE and OneL. From initial inquiry to final contract execution, OSD has streamlined the procurement process utilizing AI.



ABE is predicted to reduce the burden on procurement and legal staff by handling approximately 3000 inquiries in its first 3 months of use, 85% of which to be resolved without escalating to a human subject matter expert. Based on the average staff response time of 15 minutes per inquiry this represents an estimated savings of 300 staff hours in the pilot period alone. At a conservative loaded labor rate of \$60/hr., this translates to approximately \$18,000 in saved personnel time- resources now allocated to higher value legal and procurement functions.

OneL currently finished the pilot with early-stage results showing a **83.33% reduction in attorney time** spent on initial vendor proposal clarifications. OneL flags ambiguous or conflicting language, creates a redline, and annotates the redline with corresponding RFR or terms and conditions section numbers. Assuming the average vendor document is approximately 40 pages (they can be Significantly longer!) and it takes a skilled attorney approximately 6 hours it will now take them 1 hour, saving 5 hours per document! In FY24 alone, OSD legal negotiated 62 vendor clarifications. What typically would take OSD Attorneys 372 hours, now takes 62 hours, saving 310 hours of legal review, or approximately \$31,000 based on current rates (\$100/hr).

Both tools were built with open frameworks and iterative feedback in partnership with AI students from Northeastern University's Burnes Center for Social Change, reducing vendor costs and allowing for rapid prototyping. As usage scales statewide, conservative extrapolation suggests combined annualized savings exceeding \$100,000 across legal and procurement review processes, with corresponding improvements in delivery times. ABE and OneL demonstrate clear potential for both direct cost reductions and improved operational efficiency. They streamline previously manual repetitive tasks, allowing expert staff to focus on higher- complexity issues and provide a replicable model for other states to adopt with modest investment.

Conclusion

Massachusetts has long been recognized as a trailblazer in public procurement, and the development of our dual AI agents, ABE and OneL, an intelligent procurement chatbot and a LLM contract reviewer, demonstrates our continued commitment to leading with innovation, impact and integrity. Developed in close collaboration with Northeastern University's Burnes Center for Social Change, our approach prioritizes responsible innovation, real-world usability and public value. ABE delivers immediate access to accurate procurement information, democratizing knowledge and freeing up expert staff, while OneL streamlines legal workflows, allowing attorneys to focus on nuanced negotiations rather than repetitive compliance checks.

What makes this initiative truly stand out is not just its novelty but its replicability. Built using open frameworks and ground in practical use cases, both AI agents are designed to be easily adapted by other states- regardless of size or technical infrastructure. **Early implementation has already yielded measurable savings in time and labor, reduced processing bottlenecks and significantly improved service responsiveness for vendors and state agencies alike.**

In harnessing AI to meet public procurement needs with transparency, speed and efficiency, Massachusetts is not just responding to the future- we are helping shape it. ***This initiative exemplifies the spirit of the Cronin award: pioneering solutions that are innovative, impactful and ready to elevate procurement excellence across the country.***



Assumptions:	Highest-Volume	Expected-Volume
Number of Users	315	50
Site Visits per Month	6300	1000
Interactions Per Site Visit:	25	25
Claude)	1	1
Avg tokens per interaction	2048	2048
Total Interactions per Month:	157500	25000

	High-Volume	Standard Volume					High-Volume	Standard Volume
Service	Monthly User Interactions	Monthly User Interactions	Cost	per Unit	Usage Unit	Usage Description	Monthly Cost	Monthly Cost
AWS Bedrock (Claude)	157500	25000	\$ 0.00	1000	tokens	LLM API calls	\$ 580.61	\$ 92.16
AWS Knowledge Bases	Continuous	Continuous	\$ -	24	hours	24 hours daily usage	\$ -	\$ -
AWS API Gateway	157500	25000	\$ 1.00	1000000	requests	API management/requests	\$ 0.16	\$ 0.03
AWS Lambda Compute	472500	75000	\$ 0.20	1000000	requests	Request Handling	\$ 0.09	\$ 0.02
AWS Cognito	Continuous	Continuous	\$ -	10000	users	User Authentication	\$ -	\$ -
AWS DynamoDB	Continuous	Continuous	\$ -		requests	User Authentication	\$ -	\$ -
AWS OpenSearch Index	720	720	\$ 0.24	1	hours per OCU	Syncing Files - 2 OCU	\$ 345.60	\$ 345.60
AWS OpenSearch Search and Query	720	720	\$ 0.24	1	hours per OCU	Query - 2 OCU	\$ 345.60	\$ 345.60
AWS OpenSearch Managed Storage	50	50	\$ 0.02	1	GB	Storage for RAG	\$ 1.20	\$ 1.20
Subtotal							\$ 1,273.26	\$ 784.60
Indirect Costs (monitoring, etc)				10%			\$ 127.33	\$ 78.46
Total Monthly Estimate							\$ 1,400.59	\$ 863.06

[SWC#] Acceptance of Terms

Instructions

Bidders must complete and submit this form with their quote.

The [SWC#] Strategic Sourcing Team and the Operational Services Division intend that the terms and conditions specified in the RFR, including those incorporated by reference, and following the defined order of precedence uniformly apply to all awarded vendors. Vendor terms, including those of vendor's subcontractors, not submitted with the vendor's quote in electronic editable format, and click through end user license agreements (EULAs) and those referenced via hyperlink are hereby rejected.

Bidders seeking clarification or exception to any term of the RFR must complete the table below, Bidder Exceptions. Additional rows may be added to the table if necessary.

Note that the quantity and nature of exceptions may adversely impact the bidder's evaluation score, up to and including disqualification.

Select one:

☐ [Bidder Company Name] accepts the terms and conditions of the [SWC#, SWC Title] Request for Response without exception.

☐ [Bidder Company Name] accepts the terms and conditions of the [SWC#, SWC Title] Request for Response subject to the clarifications and/or exceptions listed in the table below.

Authorizing Signature for the Contractor

Signature and Date Must Be Captured at Time of Signature

X _____.

Date _____

Print Name _____

Print Title _____

Bidder Exceptions

Document Title and location of text, i.e. section, paragraph, page...	Current Language	Bidder requested clarification or language

How to Replicate Massachusetts' Secure, Public/Academic Developed, Dual AI Agent Model for Procurement

Overview:

Massachusetts implemented two complementary AI tools—a chatbot to provide real-time procurement guidance, and a large language model (LLM) to assist in contract review. This dual deployment enhanced access, accuracy, and oversight. Other states can adopt this model in a phased, cost-effective way using existing tools and policy alignment.

Step-by-Step Replication Guide

1. Identify High-Impact Use Cases & Stakeholders

- Gather input from procurement, legal, and IT teams.
- Target areas with:
 - High question volume (ideal for chatbot)
 - Delays or risks in contract processing (ideal for LLM)

2. Identify local Academic programs to Partner with

- Clearly define state vs student roles to safeguard regulated data
- The state owns AI models, code and any intellectual property
- alignment with timelines (will students work over the summer?)

3. Deploy a Chatbot Using Existing Infrastructure

- Use Microsoft Power Virtual Agents, Google Dialogflow, or secure open-source options.
- Train it on:
 - State procurement manuals & FAQs
 - Internal policies & workflows
 - Launch internally for staff, then scale to other agencies

4. Integrate a Contract-Review LLM with Guardrails

- Use a secure environment (Azure OpenAI, AWS Bedrock, or local instance).
- Create a Vendor Response template to standardize inputs for redlining
- Feed in:
 - RFR and Terms and Conditions
 - Clause libraries
 - Risk and compliance checklists (e.g., accessibility, indemnification)
- Pilot it on already negotiated redlines and refine with legal feedback.

5. Establish Governance, Change Management and Oversight

- Involve legal, procurement, and IT leadership early.

- Ensure tools meet state security, accessibility, and transparency standards.
- Create audit trails, prompt reviews, and human-in-the-loop protocols.

6. Measure, Improve, and Scale

- Track metrics:
 - Contracts reviewed/time saved
 - Inquiries answered by chatbot
 - Issues flagged by LLM
 - Use data to expand the system to more agencies or contract types.

7. Collaborate and Share

- Join NASPO, NASCIO, and other networks to share:
 - Use cases
 - Prompt libraries
 - Policy templates
 - Consider regional AI partnerships for shared clause databases or training resources.

Success Tip:

Start small, show impact, and scale smart. You don't need a full tech overhaul—just a targeted, user-centered deployment of AI tools that work with your people.



State of Michigan

Department of *Technology,*
Management, and Budget Central
Procurement Services

2025 George Cronin

Awards for Procurement Excellence

**rAMP UP! to Success for New
Buyer Training and Retention**

Executive Summary

The procurement professionals in Michigan's Central Procurement Services (CPS) have roles and responsibilities that are vastly different from our agency buyers or their private sector counterparts. When new hires join CPS, regardless of their prior procurement experience, making sure they understand the specific demands of office is critical. *rAMP UP! - Getting Started in Central Procurement Sourcing* is designed to prepare new procurement professionals their responsibilities throughout their employment. It supplements the existing AMP! (Achievement in Michigan Procurement) training and was designed to fill the gap from when new staff start to when they go through AMP! certification.

The goal of *rAMP UP!* is to provide a comprehensive, consistent, and self-paced training program with hands-on instruction and information so that new staff become productive as quickly as possible. Historically, there was an awkward period that could stretch on for weeks where new procurement professionals lacked sufficient knowledge to begin their assigned tasks. Even with a strong procurement background, they needed to get up to speed on our organization, policies, procedures, templates, resources, and more. At the same time, their managers and other staff are typically not able to spend hours each day working with them because of competing responsibilities. That changed with *rAMP UP!* and now they have a full complement of formal training starting from day one.

Innovation

The *rAMP UP!* program includes state-of-the-art learning formats and a wide variety of tools and structured support to ensure lasting impact. The curriculum is designed to promote consistent learning over time, preventing information overload and encouraging reflection. Lessons are presented in manageable, easily digestible chunks to get learners quickly up to speed. Learners work through simple scenarios to build familiarity, then complete interactive hands-on assignments with case studies to demonstrate their understanding.

Key Features include web-based and micro-learning training modules; short video clips; realistic, guided scenarios with immediate feedback; instructor-led training sessions; a centralized training webpage; structured timing and pacing; hands-on assignments, as well as a full suite of templates, reference guides, and job aids to ensure learning translates into real-world application. Learners also have access to organized checklists and annotated guidance documents to keep them on track with tasks they need to accomplish.

Additionally, *rAMP UP!* is developed modularly, by topic, so new content can be added quickly to meet the changing needs of our new employees. Content development priorities can also be shifted much quicker with this approach as well. Once learning objectives were approved, stakeholders provided in-depth input during the design and development phases. To ensure that a variety of viewpoints were obtained, great care was taken to select the right mix of participants, from new hires to seasoned procurement professionals.

The success of *rAMP UP!* is not based on the modules alone; each new procurement professional is matched with a mentor to provide guidance and context; answer questions; initiate job shadowing experiences and provide ongoing support throughout the training journey.

At key points in the program, pre-formatted emails help setup review sessions with the mentor

to discuss newly learned concepts and obtain further guidance (i.e. level 3 Kirkpatrick evaluation). Additionally, our dedicated training team provides an added layer of support, giving buyers a chance to ask questions, clarify instructions, and review lessons and resources before meeting with their manager/mentor.

rAMP UP! also benefits existing staff by providing easy access to documented processes and procedures– helping to level-set their knowledge. As the program has evolved, it has enabled consistent methodologies across the sourcing team and encouraged team engagement in identifying best practices and process improvements.

Transferability

rAMP UP! is a highly transferrable program. Other states and public entities can use or leverage many of its features in multiple ways. *rAMP UP!* provides a roadmap to undertake similar training initiatives, and much of it can be easily repurposed or used as-is.

Current topics in the *rAMP UP!* include procurement foundational concepts, getting started on a Statement of Work, navigating specific purchasing tasks in Michigan’s e-procurement system, completing a contract change notice, identifying and analyzing a contract portfolio using the state’s contract database, cost modeling and pricing, using the state’s e-signature tool, and preparing for and facilitating Joint Evaluation Committees, and more.

rAMP UP! was created using a modular format. Other states can use what Michigan has done as a template to create their own modular program, easily edit or copy learning objectives, and individual modules. Additionally, CPS has spent time analyzing what learning topics are suitable for self-paced learning versus those that need more interaction, which other states could use to help guide the best format for a learning a topic.

Commonly accessible tools were used to develop *rAMP UP!*, such as Articulate 360 for Teams, SharePoint, and Microsoft Office suite, making it easy for other states to start their own programs. Training is built on the Request for Proposal (RFP), a broadly used solicitation type. It doesn’t matter whether a state has a centralized or decentralized procurement organization - the training can be used in both environments.

Service Improvement

Reducing the time managers and co-workers spend training new procurement professionals allows them to focus more on their core responsibilities. Moreover, equipping new employees with the required knowledge and skills before they begin their work prepares them to hit the ground running and deal with everyday challenges more effectively. In short, the quicker new employees get up to speed, the higher the overall level of customer service.

Just as importantly, *rAMP UP!* provides a common curriculum of information. Thus, customer agencies receive consistent guidance regardless of the sourcing division. For example, new procurement professionals are now executing change notices (a basic procurement function) more consistently than before the implementation of the *rAMP UP! Change Notice* training.

These improvements are important. CPS feels the most important service improvement, professional development and training services, is experienced by our procurement professionals. Due to the high level of interest and commitment from Sourcing staff and leadership, an extensive change management strategy was not needed; staff have been eager



to take the training - rather than being told that they had to. Both new and existing buyers are very supportive of the program (“Best training we’ve ever had!”).

rAMP UP! has succeeded in its goal to improve service: state agencies are receiving more consistent service and managers are able to provide new staff with a thoroughly vetted, turn-key training program, and procurement professionals have a better experience becoming a member of the CPS team.

Savings & Efficiency

Better trained, more experienced employees are clearly more productive – and when they are successful and comfortable with the work they are doing, they typically stay with the organization. In addition, when current staff spend less time training others, as explained above, it saves time and effort – even if it’s hard to put an exact number on it.

High retention rates are essential to a procurement organization’s success in preserving institutional knowledge, maintaining supplier and stakeholder relationships, and sustaining team productivity. Conversely, high turnover results in significant direct costs (i.e. recruitment, training, and onboarding) and indirect costs.

CPS is very focused on employee retention and on cultivating lasting employee engagement, including the continued development of rAMP UP! modules. Our success is demonstrated by the fact that none of the 12 buyers hired since February 2023 have left our employment. This represents real savings; the cost of not retaining procurement professionals is significant – up to three times that employee’s salary (Oboloo: *The Hidden Costs of Employee Turnover in Procurement*, 2023). Given the average salary for a procurement professional in CPS is just under \$89,000, even if only one procurement professional per decade is retained it would equal a savings of over \$266,000.

Conclusion

Onboarding new employees is a challenge in any industry. Getting a new hire up to speed can be a lengthy process. Without a formal new-hire training program, managers and other staff spend their time juggling their other work with onboarding and new hire training. Effective on-demand training is a critical tool in achieving that balance.

rAMP UP! has been an absolute game changer for new buyers in Central Procurement. It reduces the frustrations of being new and uninformed. It provides them with a space to learn where they don’t feel like they are in their manager’s way. They can learn processes and terminology at their own pace. There is no pressure; there are no exams. The focus is purely on making them comfortable and productive as quickly as possible so that they can start to make meaningful contributions.





EXHIBIT A

STATE OF MICHIGAN
PROCUREMENT



rAMP UP! Getting Started on Change Notices



rAMP UP! Introduction to Cost Modeling and Pricing



rAMP UP! Introduction to Cost Savings



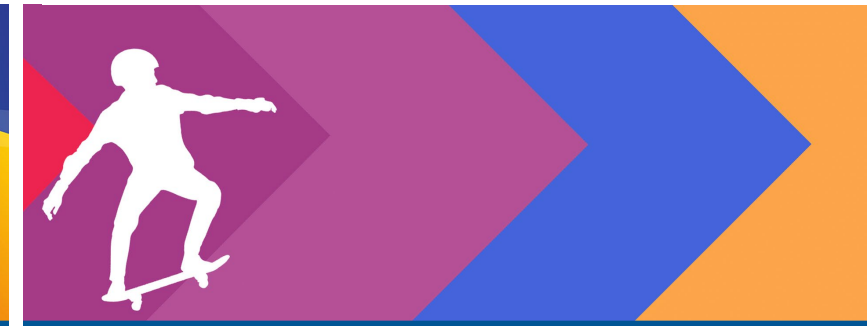
rAMP UP! Contract Portfolio Overview



rAMP UP! Risk in Procurement



rAMP UP! Getting Started on the Statement of Work (SOW) Module



rAMP UP! Writing an SOW 03:
Schedule A Background and Scope



**rAMP
UP!**

Meant to be bright, retro, and fun, the rAMP UP! Training Program pulls colors from other Achievement in Michigan Procurement programs.

Earlier lessons prepare students to take our AMP Level 1 certification. Later lessons reinforce and expand on training from our Request for Quote, Level 1, and IT programs.

rAMP UP! modules and resources can be found on our Central Procurement training SharePoint pages.

About rAMP UP!

Welcome to the rAMP UP! *Getting Started in Central Procurement Sourcing* page.

rAMP UP! prepares both new hires and seasoned Purchasing Professionals with comprehensive resources and self-paced training for the procurement tasks they are responsible for throughout their employment.

This page includes self-paced training with reference tools and guides, mini-case studies, and hands-on assignments for review with a manager or mentor.

Pro Tip: Bookmark everything!

We regularly add resources and training to this site - and announce when new items are added!



Quick Link to Procurement Document Training Page



Click the image to navigate to the page!

Module content makes full use of the bright color palette and leverages the Articulate Rise block library to reuse common components.



Key Terms

We will be introducing professional terminology in this lesson. You should already know the following terms from previous lessons, previous work experience, or from your onboarding training:

- Request for Proposal (RFP)
- Contractor or Vendor
- Subject Matter Experts (SMEs)
- Statement of Work (SOW)

In this lesson, we will define:

- Service-Level Agreements (SLAs)
- Liquidated Damages



Pro Tip! Build your professional vocabulary. To access definitions at any time, visit the [Glossary of Terms on the rAMP UP! page](#).

Contract Expiration and Transition Times

A critical task in managing a contract portfolio is to look ahead and plan for expiring contracts, whether the contract is in its initial term or has options available.

Each contract has a **Transition** time assigned to it, which is defined in the contract terms. This is the time needed to prepare a new contractor and wrap up working with the current contractor. The time needed will depend on the complexity of replacing the contract.

Image & text ▾



And don't
forget the
skateboards!



You may be new, but you got this!

In addition to noting well in advance when a contract will expire, you also need to consider the transition time allotted for a particular contract. Some contracts require little transition time - such as a contract where you stop ordering from one contractor and start ordering from the new one. Other contracts are much more complex and may require six months or more transition time. It is expected to have a new contract **in place** at the start of the transition time to allow the changeover to take place.

At this point in your training, you are asked to be aware of **expiration dates** and **transition times**.

Practice exercises and activities are woven throughout modules to ensure key concept reinforcement.

Using the Processing Contract Change Notices fo...

Excerpt from the *ANNOTATED Processing Contract Change Notices for CPS Reference Tool* additional info in a text box in the left margin.

*ANNOTATED Processing Contract Change Notices for CPS
Reference Tool*

OPEN DOCUMENT



STOP!

Did you download the annotated document above and read through it, including viewing the videos? It holds key information that aligns with several learning objectives and tasks you'll need to demonstrate for your manager review.

Stop here until you have achieved this step.

Did we mention to download and review the annotated reference tool?

Contract Portfolio Overview | Rise

rAMP UP!

rise.articulate.com/author/qTCdVKE7jES86vcQGJy4iVLrojWaaKOO#/author/details/EVNFsTvCseMk1dN8KD2mLFaR4-MwoAqg

Your Videos on Vyo...ImportedMicrosoft Forms - G...Fingerprint Security...DTMB Onboarding...DTMB-SPC-Procure...Overview of migrati...Geek Speak FontAdobe Connect 12 ~...Adobe Connect Wo...Image sizing and sc...Benefits for Life Em...All Bookmarks

Contract List

PREVIEW

The column titles in the spreadsheet refer to the fields you saw in form view of the contract displayed in the database. Since all of this information is available in an Excel report, this enables you to be able to sort, filter, and review your active contracts in any way you may need.

Practice Activity!

Example Report

The following file has been provided as an example of what a contract list from the database will look like. This report is populated with sample data, and definitions added to the top of each column for easy reference!

Download and open the file below and use it for the following activity.

XLS

rAMP UP Module 2 - Contract List Export EXAMPLE.xlsx

37.2 KB

↓

1


33

Search

74°

3:26 PM
4/8/2024

Meet Zoey Champ!

Disconnect 



Zoey is a rockstar who doubles as an SOM Purchasing Professional.

About Zoey

Zoey Champ is a bright young buyer who has been working as a Purchasing Professional for the State of Michigan for about a year and a half. Like you, she started out working on change notices and now has multiple RFPs that she has completed from start to finish. While she has confidence in her ability to write an SOW, she is also still learning and isn't perfect.

As you walk through the Writing an SOW **rAMP UP!** lessons, you'll read about her perspective and choices when writing an SOW. You can use (or use!) those to guide your decision-making during the practice activities.

You'll hear her thoughts and questions, read through her solicitation team notes, and see how she decided to format each section of the Statement of Work.

In the SOW modules, a 14-unit microlearning series, follow our persona, Zoey Champ, as she explores each step of the Statement of Work for a Department of Natural Resources ice for resale solicitation.

Service Requirements to Consider: Ice for Resale

In reviewing her notes, Zoey needs to consider the services that will be provided by the Contractor regarding ice that State Parks will be reselling, as well as the merchandiser units the Contractor will be providing:

- How often will ice be ordered?
- How soon must ice be delivered after the order is placed?
- When and how will merchandiser units be installed?
- Maintenance of the merchandiser units is important - what is the timeframe for repairs (or replacement), should one of the merchandisers break down?



Good questions make good requirements!

2.2 Delivery

2.2 Delivery

The Delivery section should state the exact details about the delivery:

- Days or hours from date of order
- Specific times – business hours or between certain hours
- Address and location information

Embedded Storyline segments allow you to interact and toggle between SOW template views and Zoey's SOW.

SOW Template

Zoey's SOW

2.2. Delivery

Delivery will be expected within [xx] calendar days upon date of order [between the hours of x and x OR during business hours]. Delivery will be made at [add address or other details].

- | | |
|--------------------------|--|
| <input type="checkbox"/> | I have reviewed the above requirement and agree with no exception. |
| <input type="checkbox"/> | I have reviewed the above requirement and have noted all exception(s) below. |

List all exception(s):

Bidder must describe how they comply with the above requirement(s):

2.2 Delivery

Zoey's SOW for the Ice for Resale RFP specifies that deliveries must take place:

- Within 24 hours of date of order (or on an established weekly schedule with park locations)
- During park office open hours

Zoey also references Attachment 1, which is a spreadsheet of all State Park locations, office hours, and primary contacts. Because this RFP is a multi-award that encompasses all Michigan State Parks, an attachment is the best way to include all this information, rather than listing it here.

Would you have done anything differently?

Zoey's
Notes



SOW Template

Zoey's SOW

Toggle back to check the SOW template.

2.2. Delivery

Delivery will be expected within 24 hours of date of order for state parks. Delivery schedule with the park locations, office hours (hours differ by location), and State Parks, Office Contact Information.

Read how Zoey formatted an SOW section. Open her kickoff notes to see if she missed any details.

NOTES FROM ICE FOR RESALE KICKOFF

plus SME notes

DNR purchases ice for resale for its state parks. This will be a multi-award as a three-year contract with two one-year options to extend.

Exact quantities of ice are unknown (varies by park and season) but are typically provided in 7-lb bags, 22-lb bags, or 10-lb blocks. Delivery within 24 hrs of order. Contractor must send order acknowledgement via fax/email within 8 hrs of request.

Contractor needs to include the merchandiser unit to store the ice (what is an ice merchandiser?? SME says it's basically those ice freezers out front at the 7-11) Cost of the merchandiser - monthly rent? Factored into total price?

Delivery - include stacking in merchandiser, signature on receipt by full time employee.

Investigate- any warranties on the equipment? What do they do in the case of recalls? Any special incentives--will the Contractor buy back unused ice?

Merchandiser Units (official name) - Contractor to provide with no additional fees/rental. Contractor responsible for standard maintenance and repair within 24 hour timeframe. Needs to be dropped off on site within 48 hrs of first order (installation - basic setup). Units cool fast - no advanced prep needed.

At the end of each lesson, trainees can indicate they are ready for their manager/mentor reviews. Clicking a link will open a pre-formatted email with the list of proficiencies for the lesson.

I am ready to review this content with my manager or mentor.



Manager/Mentor Review

Notify your manager/mentor today that you are ready for your review and will be sending them a meeting invite.

You'll need to demonstrate the steps for creating a change notice, using the *Processing Contract Change Notices for CPS Reference Tool* and be able to perform these tasks.

1. Open a Change Notice form in MiProData.

All new hires are assigned mentors who they will work with and shadow for their first six months on the job.

 Send	From ▾	MooreR2@michigan.gov
	To	
	Cc	
Subject		Need to schedule my review for <u>rAMP UP!</u> Getting Started  Select a Label ▾

[manager/mentor name],

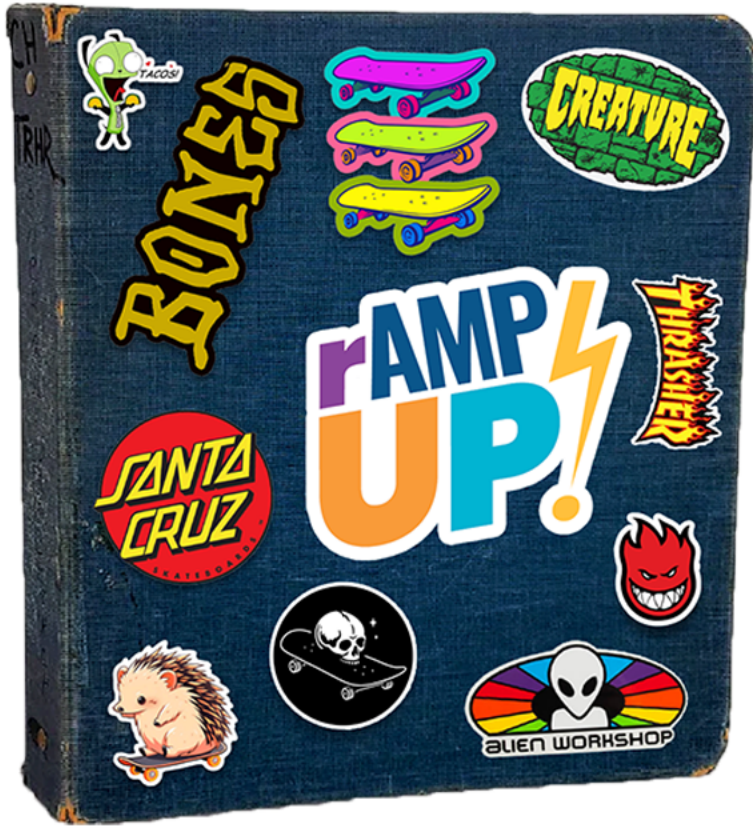
I am ready to schedule my review for the rAMP UP! Getting Started on Change Notices Module. I will be sending a meeting invite shortly.

I will be able to demonstrate the steps for creating a change notice, using the Processing Contract Change Notices for CPS Reference Tool and be able to perform these tasks:

1. Open a Change Notice form from a Contract form in CDB tools.
2. Determine the effective date based on the type of chance notice.
3. Identify when a change notice requires updates in SIGMA.
4. Identify a correct folder structure for a contract with change notices.
5. Recognize the major steps, in order, for the change notice process.
6. Identify when a change notice requires Ad Board approval.
7. Identify when a change notice requires savings to be entered.

Thank you.

[your signature line]



- **SOW Practice Activity Instructions**
- **SOW Aggregate Project Kickoff Notes**
- **SOW Writing Rubric**

After completing the SOW modules, trainees write a practice SOW to demonstrate their learning.



SOW Practice Activity Binder



State of North Carolina

Department of Administration
Division of Purchase & Contract

2025 George Cronin Awards for Procurement Excellence

PAC-a-Palooza: Preparing Interns for Public Procurement Service

Executive Summary

“I was trusted with real responsibilities that helped me discover my skills and abilities...it wasn’t just an internship – it was the beginning of becoming who I was meant to be.” This quote comes from a college student, choosing to find value and interest in public service, when exploring options of fame and fortune is the norm. This intern served at North Carolina’s Department of Administration (NCDOA), Division of Purchase & Contract (P&C). NCDOA implemented P&C Aspiring Procurement Professionals (PAC-APP) in 2020 to address the workforce shortage by creating a talent pipeline. The program aims to dispel myths and offer interns hands-on experience in procurement, allowing them to explore the power of public service while gaining meaningful and relevant knowledge. This executive summary will provide an overview of P&C’s internship program, detail its impact, describe the proven results, and show the ease of transferability to other government organizations.

Implementation of PAC-APP includes thorough onboarding, intentional pairing of interns’ interest, thoughtful project schedules, and regular check-in meetings with interns and mentors, yielding a fruitful workforce development pipeline.

PAC-APP is truly unique in its approach to developing aspiring procurement professionals. Rather than the traditional 3-month summer internship, PAC-APP provides an 11-month experience that interns complete alongside their collegiate programs. This affords the opportunity to establish meaningful relationships and engage in significant work.

PAC-APP’s design makes it easy to replicate by other states or entities. By including aspects that make NC’s program successful, other states can implement similar programs to achieve like results.

Investing fully in interns has provided substantial savings in cost and efficiency. P&C has had 33% of participating interns return to the program. Additionally, 33% of participating interns have returned for full-time employment in public procurement. This has resulted in cost savings for the state.

An additional aspect to note is the relational component of PAC-APP. Program goals include cultivating lasting relationships ensuring that interns feel a sense of belonging and value.

This application is titled PAC-a-Palooza: Preparing Interns for Public Procurement Service. Are our interns impacted? Yes. Are our interns prepared? Yes. Are our interns able to connect their academic and professional experiences? Yes. Are our interns eager for state service? Yes. Let us show you how we designed a successful internship program that “gets us to yes” and truly impacts the work we do in North Carolina.

Innovation

PAC-APP addresses workforce shortages by equipping college students with practical experience before graduation and creditable state work service time, making them procurement entry-level position eligible. Unlike conventional internships, this program places students in the state procurement office, where they engage in procurement projects, contract management, and real-world procurement activities—rather than routine administrative tasks. Over 11 months, interns balance their collegiate studies while committing to 40 hours per week in the summer and 25 hours per week during the school year, gaining nearly a full year of hands-on experience (Hefferman, 2024). By completing two cycles, they fulfill both degree and experience requirements for entry-level procurement roles, effectively bypassing traditional hiring obstacles. The program has already facilitated several interns’ transitions into full-time positions, proving its effectiveness as a workforce development model.

PAC-APP has proven to be a unique, impactful and effective program. Its components clearly distinguish it from similar programs across the industry. Since beginning in 2020, 15 interns have served NC through this program, contributing to the development of a public procurement pipeline of relevant talent ready to enter the workforce.

PAC-APP offers a uniquely extended internship for pre-service professionals, starting in the summer with full-time, 40 hours per week, immersion in procurement training, job shadowing, and project work. Interns then continue part-time, 25 hours per week, for nine months, bridging classroom learning

with practical experience. By reimagining the traditional internship model, PAC-APP delivers a fully immersive approach with proven results.

PAC-APP is original and ground-breaking because of the long-term, practical, and relevant experience provided to interns. Because of the 11-month term, interns become fully immersed in the work and therefore lead impactful projects under the guidance of skilled mentors. Many of the past interns have stated that taking on full responsibility for their projects has given them the autonomy and the practical experience necessary to better understand the procurement industry. In the words of one intern, “...I was given more independence and was trusted with more complex tasks, which allowed me to contribute more significantly to projects.”

PAC-APP is novel in its approach to developing aspiring professionals. The cornerstone of the program is ensuring that interns feel valued, heard, and inspired. P&C accomplishes these goals by including a thorough and engaging onboarding experience called EMBARK. This experience acclimates interns to P&C and sets the stage to become integral team members. EMBARK is an acronym which stands for Entering Mind-blowing And Really Kool P&C and it is with this energy that the interns are welcomed. The State Procurement Officer and Deputy State Procurement Officers join the onboarding team for an in-person EMBARK meeting with the intern(s). This meeting is an overview of the state procurement office, and the functions performed in the five service areas to both introduce and perhaps pique the interest (for subsequent assignment/project areas) of the intern(s).

Additionally, PAC-APP is set apart from others by its intentional intern/mentor pairing based on the intern’s course of study and the mentor’s expertise. This maximizes collaboration and ensures a positive working relationship. Purposeful project schedules are aligned with skills and interests. Mentors are committed to providing the needed scaffolding to bring the intern from foundational learning to confidence over their work. Regular check-in meetings called Monthly Intern/Mentor Issues Check-In (MIMIC) are also held. During MIMIC, interns and mentors come together to share project updates, engage in meaningful professional development (called the MIMIC Minute), and share ideas around best practices for personal and professional life balances.

P&C is committed to providing rewarding experience with relationship-building at the center. The program strives to make interns feel part of the team. P&C consists of five service sections: Strategic Sourcing, Contract Management, Operations & Systems Support, Risk & Compliance Management (RCM) and Procurement Education. During staff meetings, each section reports by team, e.g. Strategic Sourcing Team 1, Team Contract Management, or Team RCM. Interns are included in all division meetings, provided opportunities to travel to professional conferences, and encouraged to present at them. (The 2024-2025 NASPO intern, Ian Fox, presented at 2024 REACH and 2024 Partnership Forum). They are also encouraged to support one another. A dedicated, clustered personal workspace is provided, so that interns can offer support to each other and readily engage in peer networking. To illustrate their collegiality, they often refer to themselves as Team Intern! This demonstrates their sense of belonging as they are fully immersed in state service.

Together, these unique aspects of PAC-APP greatly impact P&C with positive change as it prepares talented individuals eager and ready for state service.

Transferability

PAC-APP’s design makes it easy to replicate by other states or agencies. By creating programs with NC’s proven components, or adding them to existing programs, other states can broadly use this model to offer programs that deliver similar results. No special resources are needed for implementation. Replicating states merely need a restructuring of existing internship programs and a commitment to practices showcased by PAC-APP. Because there are a variety of ways to implement the outlined principles, replicating a similar program can be done regardless of environment, structure or agency needs. Further, geography, staff size, or legal parameters will not impact implementation. The following table highlights NC’s program components, steps to replicate, expected results, and limitations/workarounds.



Component	How to Replicate	Results	Limitations/Workarounds
Provide foundational learning and deeper experience	<ul style="list-style-type: none"> Offer 11-month term Use class schedules to maximize collaboration Offer remote-work or hybrid during semesters 	<ul style="list-style-type: none"> Interns lead meaningful projects Fully prepared for workforce; entering with year(s)' of experience Increased team productivity 	<ul style="list-style-type: none"> Limited budget for 11-months; shorten to semester/quarter Offer unpaid internships Partner with colleges offering credit for state service
Ensure Interns feel valued, heard and supported	<ul style="list-style-type: none"> Provide scaffolding PD/presenting Personal workspaces Share projects/best practices (MIMIC) 	<ul style="list-style-type: none"> Increased likelihood of interns returning or retained for full-time service 	<ul style="list-style-type: none"> Smaller staff sizes employ fewer interns
Develop lasting relationships	<ul style="list-style-type: none"> Thorough onboarding (EMBARC) Mentor/Intern pairings on interest/experience 	<ul style="list-style-type: none"> Increased likelihood of interns returning or retained for full-time service 	<ul style="list-style-type: none"> Rotate through different mentors to offset possible staff turnover

Table 1. Replication Model

Other states that wish to provide interns with meaningful experiences, increase productivity, and retain well-prepared employees for state service can use NC's model as a benchmark to achieve these goals. NC stands behind PAC-APP and considers it to be a foundational pillar, resulting in the betterment of the state and society. We encourage others to embark on such a rewarding and meaningful endeavor.

Service Improvement

Government workers across the nation seem to have in common the issue of limited time and resources to complete the work at hand. Issues common for many central procurement offices include an abundance of projects, long timelines, and an overload of contract management tasks. A great solution is often, *hire an intern!* Many states that have tried this approach know that, although interns are often eager and willing to help tackle the tremendous project log of their employers, they are often unable to provide substantial assistance due to their unfamiliarity with the work and limited time i.e., summer internship.

PAC-APP addresses this dilemma through its program. Program data shows that by implementing a program that emphasizes a supportive culture, focuses on substantial growth and learning, and offers opportunities for significant contribution, interns stay longer, return for continued service, and assist teams with meaningful, value-added work. This has had a profound impact on NCDOA and its stakeholders. When surveying interns (n=7) about their experiences (See Appendix 1), NC found the following:

Retention/Recruitment		Contributing Factors	
Highly likely to return as intern	100%	Contributed significantly; gained real-world experience	100%
Highly likely to return to full-time work	100%	Felt supported/valued; felt sense of belonging	100%
Highly likely to recommend state service to peers	66%	Learned; gained procurement awareness	100%
		Grew; realized potential	57%
		Gained confidence	43%

Table 2. Intern Survey Responses

The data above suggests that 100% of interns reported that they felt supported, gained relevant experience/awareness, and contributed significantly. Over half (57%) reported that they experienced

growth, and almost half (43%) reported that they gained confidence. Comments from interns such as, “P&C made me feel welcome and valued.” and “I was trusted with real responsibilities.” illustrate the program’s positive outcomes. (See Appendix 2). Encouraging interns to contribute in a significant way positively influences service improvement. Fully engaged interns contribute to increased efficiency through the support they offer the team. For example, a current intern manages NC’s expansive statewide term furniture contract. Assuming this significant role has reduced the workload for existing team members. This allows those team members to provide a higher level of service due to a reduced contract and service load. This increased efficiency impacts stakeholders as they experience effective performance of contracts, more prompt customer service, and more streamlined procurements.

Internal stakeholders (P&C teams) have a tremendous input in the development/modification of PAC-APP. Because interns support the work at P&C, the stakeholders contribute to the process of onboarding and support. Team leaders are fully invested in relationship-building and scaffolding, and support interns by attending and contributing to the Monthly Intern/Mentor Issues Check-In (MIMIC).

In NC, well-trained and committed interns result in improved service delivery. Because PAC-APP’s cornerstone is to fully develop interns for meaningful work, interns stated they were highly likely to return for additional internships (100%), or full-time employment after graduation (100%).

NC arrived at the metrics to support these findings by surveying current and past interns and conducting a trend analysis around return rates and contributing factors. Based on the responses, NC arrived at percentages of return rates and impact of contributing factors. Since the program’s beginning in 2020, 33% of PAC-APP interns returned for additional internships, and 33% returned to full-time service. Returning interns hold specific institutional knowledge which reduces the learning curve that typically comes with new hires. This impacts service improvement in a positive way due to increased productivity that comes with a decreased learning curve.

Savings & Efficiency

PAC-APP has had a profound impact on cost savings and efficiency. The aim for any public service program should be to safeguard the taxpayer dollars by increasing efficiency and effectiveness. Creating an internal pipeline of talent, ready to work, from a qualified pool of candidates has been a savings in recruitment hours, onboarding, and ramping up/training entry level state procurement professionals. A report by the Society for Human Resource Management (Shrm.com) states that it costs approximately \$4,700 to recruit and hire an employee for service, but the total cost to hire a new employee is three to four times the position salary, e.g. \$60,000 salary = \$180,000 or more. When interns eager to transition to full-time join the available hiring pool, hiring costs are reduced. When states hire an under-prepared employee, additional resources must be allocated to prepare employees for service. Productivity is limited while the new hire is learning foundational aspects of the work. NC’s PAC-APP program has had tremendous success retaining interns for full-time employment.

Since PAC-APP’s beginning, 5 of 15 interns (33%) returned for full-time work in public procurement. These percentages were calculated based on HR records from 2020-2025. This contributed to potential total recruitment savings of \$23,500, with potential total hiring savings of \$300,000, based on a salary of \$60,000. Intern-hired employees brought tremendous working knowledge resulting in a reduction of time and productivity loss. For example, intern-hires trained to manage statewide term contracts were able to assume that role immediately upon hire.

Conclusion

Through the PAC-APP program, NC has acquired and retained top-notch employees dedicated to public service. NCDQA’s stakeholders have benefitted not only through cost savings, but also by shaping and equipping the next generation of public servants. In the words of one intern, “When I started my internship at P&C, I was just a junior at Fayetteville State University with no idea what procurement was. I walked in not knowing what to expect – but I found something I never imagined: a place where I felt seen, supported, and believed in. The people at P&C became more than coworkers – they became mentors and a family. They saw something in me before I saw it in myself. That belief, that encouragement, is why I stayed.”

Appendix I

References

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Appendix 2

Intern Responses

Interns were surveyed with a branched set of questions (see Appendix 3). Responses were analyzed for trends and patterns. Five categories emerged as shown below. Number of responses out of total responses given were calculated for each category. Percentage was calculated based on number of interns who returned one or more response in given category.

Total Responses: 160

Responded: n=7

- Contributed significantly; gained real-world experience - **30 responses; 7/7 interns (100%)**
- Felt supported/valued; felt sense of belonging - **62 responses; 7/7 interns (100%)**
- Learned; gained procurement awareness - **42 responses; 7/7 interns (100%)**
- Grew; realized potential - **16 responses; 4/7 interns (57%)**
- Gained confidence - **10 responses; 3/7 interns (43%)**

Category	Intern Responses
Contributed significantly; gained real-world experience 30 responses; 7/7 interns (100%)	<div>I was looking for real-world experience, and the state offered a chance...to contribute.</div> <div>I was trusted with real responsibilities ...</div> <div>[I was] trusted me with real challenges.</div> <div>The main difference was the level of responsibility I had.</div> <div>I was given more independence...</div> <div>[I was] trusted with more complex tasks.</div> <div>[It] allowed me to contribute more significantly to projects.</div> <div>I take on more responsibilities.</div> <div>[I] contribute to discussions.</div> <div>[I was able to] take on challenges.</div> <div>The state offers...environment where you can truly...make a meaningful impact.</div> <div>[I can] make an impact, and be part of something meaningful.</div> <div>I [was] doing solicitations...</div> <div>I saw serving the state in this role as a unique opportunity [for] broader responsibilities and challenges of working in a state agency, especially within a division that affects every aspect of government operations.</div> <div>This foundation...[was] on work assignments...</div> <div>Given the length of the second internship, work/tasks have been more focused...</div> <div>The internship has granted me the opportunity to be a presenter at the annual PEAK conference.</div> <div>[I had] something riding on the work I was performing.</div> <div>The work felt meaningful.</div>

	I felt [a] desire continuing my work with them.
	I feel that my opinions carry more weight due to the experience I have accrued.
	I have a direct impact on our processes and work produced.
	I genuinely enjoy managing contracts and the experience I gained was invaluable.
	I loved the...work I do.
	I've been able to speak at Philadelphia for NASPO Reach and also at NASPO Academic Forum.
	[The focus was] ...on my work output.
	I wanted to continue building on the work I had done so far.
	[It has] consecutively... been such an invaluable opportunity to keep building vendor relationships...
	I was able to take a bigger role.
	I was also able to leverage the relationships I had built with vendors during the last 6 months of my first internship into key partners for the latest iteration of the furniture contract.
Felt supported/valued; felt sense of belonging 62 responses; 7/7 interns (100%)	
	[My mentor's] continued support and guidance are invaluable.
	...the relationship with my mentor/supervisor became more collaborative.
	The people I worked with believed in my potential, and I realized that this was a career I could see myself growing in.
	P&C became a place where I felt valued, and it didn't feel like just a job – it felt like a home.
	The biggest contributing factor was the support and mentorship I received.
	I wanted to continue growing in an environment where I felt supported and challenged, and I knew there were opportunities to further develop my skills.
	I knew that I wasn't just a temporary intern – I was part of a team that cared about my development.
	The biggest reason I agreed to return for another internship was the genuine mentorship and the sense of belonging I found at P&C.
	[I saw] firsthand how much the state invests in its employees and the support available for professional growth.
	[My mentor's] belief in me helped me believe in myself, and that support has continued to guide me through my transition to full-time employment.
	[My mentor] encouraged me.
	[My mentor gave] constructive feedback,
	They [mentors] took the time to invest in my development.
	They [mentors] weren't just there to guide me through tasks...
	Through perseverance, asking questions, and relying on the guidance of my mentors, I was able to overcome my fears and build the knowledge I needed to succeed.
	They [mentors] saw something in me before I saw it in myself. It felt like a place where I could thrive, learn, and grow, and that sense of belonging kept me motivated to stay and give my best.
	From day one, the people at P&C made me feel welcome and valued.
	The number one reason I stayed was the incredible support I received.
	The state offered a chance to work with a team where I could both learn and contribute.
	That belief, that encouragement, is why I stayed.
	The people at P&C became more than coworkers – they became mentors and a family.

	I walked in not knowing what to expect – but I found something I never imagined: a place where I felt seen, supported, and believed in.
	The state offers a supportive environment where you can truly find your potential and make a meaningful impact.
	[I wasn't] afraid to ask questions...
	Overall, the support that I have received has made a lasting impact on me, both personally and professionally.
	They [mentors] have taken the time to share their own career journeys and offered thoughtful advice about navigating careers in the public sector.
	This foundation set the tone for the internship with my supervisors offering regular feedback and support on work assignments, as well as being understanding of my class schedule.
	From the beginning, they made it clear that they wanted this internship to be a learning experience, allowing me to make mistakes and encouraging me to ask questions.
	Throughout my internship, both of my supervisors have been encouraging and deeply invested in my professional growth.
	Overcoming this challenge was done by continually asking questions...
	As a graduate student still unsure about my exact career path, everyone in the division has been incredibly open to me exploring the different sections and learning more about their roles & responsibilities.
	The established culture allowed me to consistently learn new things, with the entire division being willing to share their knowledge and offer guidance on my career path.
	From my supervisors to people across the division, everyone made me feel welcomed, supported, and valued as a member of the team.
	When reflecting on my experiences with P&C, there are several reasons why I remained committed to the work, but above all, I stayed because of the culture.
	[My mentor] s a great sounding board for advice and support in Procurement.
	I am enjoying my internship experience and...the people...
	[My mentor] provided insight...
	They [my mentors] guided me...
	[I enjoyed] the chance to meet and work with so many procurement professionals...
	[I enjoyed making] as many connections as possible while....an intern. The events created to engender those connections are invaluable and are much harder to come by for a full-time employee.
	I felt welcome and valued as a member of the team.
	The work felt meaningful, and the support of the team was incredible
	They [my mentors] answer any questions I had.
	They [my mentors] provided any assistance requested and were always there.
	I... kept in communication with my supervisor to ensure everything was on track.
	I stayed with the program because it...enabled me to make meaningful connections with government employees.
	They [my mentors] also offer their help and guidance to me for my future plans.
	My mentors have helped me a lot throughout my internship.
	I love this job and this team, I don't see myself anywhere else.
	[My mentor] has been an amazing support both professionally and personally and I love her attitude and working with her.

	They've [my mentors] been invested in not just my work output but my academic and personal goals as well.
	Personally, they've also been super fun to work with...
	[My mentors] really helped me to get a balanced perspective in public procurement.
	I loved the team...
	I'd only ever worked for common high school jobs and wanted to get experience in the work culture and teamwork of procurement organizations.
	My team was very supportive and everyone was different but still positive and passionate...
	My team was the biggest reason why I returned, I honestly missed working with them and in Procurement Education.
	The mentors that I had during the internship were amazing!
	Having a team that truly loves what they're doing makes a difference and it made me learn how to work with others and that it could really bring a great outcome!
	The best opportunity would be networking with others.
	Everyone was so welcoming and were willing to help me or teach me new obstacles I would go through every now and then.
	I stayed on the full "term" because I absolutely loved the individuals that I was working with.
Learned; gained procurement awareness 42 responses; 7/7 interns (100%)	
	When I started my internship at P&C, I was just a junior at Fayetteville State University with no idea what procurement was.
	The experience also helped me refine my professional skills and gain more confidence in my role.
	In my first internship, I was focused on learning the basics and getting familiar with the work environment.
	I knew there were opportunities to further develop my skills.
	I wanted to continue growing...
	My mentors and supervisors have been instrumental in my growth.
	I was able to...build the knowledge I needed to succeed.
	My biggest challenge was stepping into a completely new field and managing the uncertainty that came with it.
	I wouldn't be where I am today without that foundation.
	At the start, I was unsure of myself and what I was capable of, but through mentorship and hands-on experience, I grew
	It felt like a place where I could...stay and give my best.
	What truly interested me was the chance to explore a field I knew nothing about and see where it could lead.
	The opportunity to learn something completely new was exciting.
	Before interning at Purchase & Contract (P&C), I hadn't even heard of procurement.
	I had worked in the private sector right out of college and wanted to see what the difference was in working for the state/public sector.
	[I enjoyed] finding out that procurement isn't just "buying" but involves many departments/roles.
	The main thing is [to see if I want to] serve the state since this is not a profit driven job as with the private sector.
	As someone interested in pursuing a career in the public sector, getting experience and a better understanding of state government was one of my top priorities.

	When starting the internship with P&C, I did not know much about state government outside of an academic setting, and I thought that the opportunity would allow me to better understand how state agencies operate and make an impact on the people of North Carolina.
	What especially drew me to this internship was the focus on procurement—an area I had limited exposure to before.
	I saw serving the state in this role as a unique opportunity to gain insight into...working in a state agency, especially within a division that affects every aspect of government operations.
	[I was able to] learn new things...
	As a graduate student still unsure about my exact career path...[I enjoyed] exploring the different sections.
	I have been able to absorb knowledge and gain experiences that have both grown my skill set.
	Professionally, the best opportunity the internship has afforded me is the opportunity to not only learn from staff within P&C but also state government as a whole.
	After sharing my desire to learn more about state government broadly, [my mentor] gave me permission to slowly start exploring other aspects of state government.
	I have gained new perspectives and formed a more comprehensive picture of what working for the state looks like at different levels.
	One of the biggest challenges for me was learning the language/terminology of the procurement field.
	[I enjoyed] being intentional about taking note of any new terminology that was mentioned in meetings.
	These conversations helped me better understand the different paths within state government and have given me a better idea of the opportunities available.
	The biggest reason I agreed to return for another internship was the opportunity to continue to learn.
	Given the length of the second internship...[I was able to improve my skills in instructional design and project management
	I was always interested in State government and an internship seemed like a great way to get my foot in the door with that career.
	I stayed with the program because it was a good way to gain experience with the State...
	[I had an opportunity for] public speaking and [was able to] explore those skills in an environment that I feel comfortable in.
	This would allow interns to gain experience in multiple teams and meet more employees.
	I was really interested in gaining experience in a “real” job.
	Both times I’ve been pushed out of my comfort zone and it’s made me so grateful for what I’ve learned so far.
	They’re [my teammates] all pushing the same way and have really taught me so much about work ethic and the role of public procurement professionals in the State of North Carolina.
	I genuinely believe that the last 2 years consecutively have been such an invaluable opportunity...[for] diving deeper into the experience and leadership of the team at P&C.
	I wanted to serve as an intern for the state because I wanted to get a better understanding of some of the behind the scenes work that goes on to ensure everything runs smoothly for everyone else.

	I honestly did not know much before serving as an intern other than wanting to help whichever department I would be in.
Grew; realized potential 16 responses; 4/7 interns (57%)	
	It felt like a place where I could thrive.
	The best opportunity my internship provided was realizing my own potential.
	[My experience] helped me discover my skills and abilities.
	The experience I had was both rewarding and transformative.
	Having seen firsthand how much the state [offers] professional growth.
	I wanted to continue growing.
	The people I worked with [focused on] my potential.
	I realized that this was a career I could see myself growing in.
	The work itself, combined with the personal growth, made staying on as a full-time employee a natural next step.
	I [was able to] embrace every opportunity for growth.
	The state offers [a place] where you can truly find your potential...
	It's a place where you can grow.
	They saw something in me before I saw it in myself.
	As a graduate student pursuing this experience aligned perfectly with my long-term goal of working in the public sector at the state or local level.
	This allows me to challenge my discomfort of public speaking.
	I stayed my full term because I wanted to get the full experience and learn as much as possible about the job and different opportunities in this field.
Gained confidence 10 responses; 3/7 interns (43%)	
	At the start, I was unsure of myself and what I was capable of.
	I grew in confidence.
	[My internship] gave me the courage to pursue a career in procurement.
	I had no experience in procurement, and at times, it was easy to doubt myself.
	I was able to overcome my fears.
	[My mentors] helped me believe in myself.
	The experience also helped me...gain more confidence in my role.
	Through this experience, I have been able to...strengthen my interest in working in the public sector.
	I have grown more confident in my abilities to understand and discuss procurement documents without further research.
	I feel confident.

Appendix 3

Intern Survey Questions

Current Interns:

1. What interested you about serving as an intern for the state?
2. What is the number one reason why you stayed for your full “term” with us?
3. What would you say has been your best opportunity that your internship afforded you (to grow personally or professionally). Explain.
4. What has been your biggest challenge, and how have you (if you have) overcome this challenge?
5. Briefly describe how your mentor/supervisors have supported you during your internship.
6. Describe any changes you would make to the internship program.
7. How likely would you be to return for another internship or to full-time employment with the state? (1 highly unlikely; 2 unlikely; 3 likely; 4 highly likely)
8. How likely would you be to apply for a full-time [temporary or permanent] position with the state? (1 highly unlikely; 2 unlikely; 3 likely; 4 highly likely)

Interns who returned for a second internship:

1. What was the biggest reason why you agreed to return for another internship with the state?
2. Briefly describe the differences (if any) between your “initial” internship as compared to your “return” internship.

Past Interns who stayed on in a full-time [temporary or permanent] position after internship, or moved from the internship into full-time employment with the state or in public procurement:

1. What were the contributing factors that caused you to stay on as a full-time employee after your internship?
2. Briefly describe if/how your professional relationship has changed between you and your mentor/supervisor after moving into full-time employment?
3. What advice would you give current interns who are thinking about continuing with state service for an additional internship or full-time state service?
4. How likely are you to recommend state service to others? (1 highly unlikely; 2 unlikely; 3 likely; 4 highly likely)





State of Florida

Department of Management Services
Division of State Purchasing

2025 George Cronin

Awards for Procurement Excellence

**Bringing State Training to our
Local Public Procurement
Partners**

Executive Summary

The State of Florida Division of State Purchasing has redefined procurement training standards by expanding access to the Florida Certified Contract Manager (FCCM) course beyond state agencies through an innovative, strategic partnership with the National Association of State Procurement Officials (NASPO) and the Florida Association of Public Procurement Officials (FAPPO). This initiative, operationalized through a formal memorandum of understanding, enabled a transformative pilot program in 2024, allowing local governmental procurement professionals to access FCCM training. Based on overwhelmingly positive feedback, the course launched statewide in January 2025, with demand exceeding capacity and plans to certify 700 local professionals in the next fiscal year.

The submission highlights four key areas of impact. Innovation is demonstrated through our novel use of partnerships and digital tools to create a scalable training model. Transferability is evident in our collaborative partnerships, cloud-based infrastructure, digital certification process, and vendor-coordinated online proctoring, all of which can be readily adopted by other states. Service Improvement includes increased training capacity, streamlined course delivery, and enhanced stakeholder engagement, especially with local entities. Savings and efficiency are realized through cost reductions in administrative tasks and printing, process automation, and more focused content.

This submission illustrates how Florida's approach not only addresses statewide training needs but sets a replicable model for public sector innovation nationwide.

Innovation

A Transformative Collaboration: The Power of the MOU

In 2024, Florida signed an MOU with NASPO and FAPPO that enabled our team to pilot Florida Certified Contract Manager to professionals outside of the traditional state agency audience. The pilot course, held in Orlando in September 2024, was a milestone. NASPO provided full logistical support—managing travel, hotel arrangements, meals, and meeting spaces—while FAPPO utilized its networks to recruit qualified participants. This ensured that the training was both relevant and impactful.

Through this collaborative initiative, our team was able to gather participant feedback during the pilot and use it to tailor the course content to better meet the needs of Florida's local government procurement professionals.

From Pilot to Program: Scalable Growth and Digital Transformation

Following the success of the pilot, Florida officially launched the FCCM course registration for local governmental entity participants in January 2025. Demand was immediate and overwhelming; all available training seats were quickly filled. In the initial program phase, we intend to certify 235 local government procurement professionals, with plans to expand and certify 700 participants in the next fiscal year. This is in addition to the 1,820 state agency certifications projected for the fiscal year. Our long-term goal is to increase these numbers annually, setting an ambitious but achievable trajectory for building procurement and contract management capacity across Florida's public sector.

In order to support this expanded scope and demand, the program undertook a parallel internal innovation initiative: transitioning from outdated administrative processes to a digitally driven certification model. This involved:

- Migrating to a new database, enabling better record management and data access.
- Implementing a digital certification issuance process, reducing reliance on paper and manual entry, and improving turnaround time.
- Employing online test proctoring, including compressed testing windows and vendor coordination to meet the increased testing volume and ensure exam integrity.

This shift not only increased our capacity to serve a larger and broader customer base but also resulted in operational efficiencies and cost savings. By reducing paper-based processing and automating manual tasks, we've significantly lowered our per-participant administrative cost—an essential improvement as we scale.

Transferability

The state's expansion of the FCCM course represents not just internal success, but a highly transferable model that other states can adopt with minimal customization. Thanks to the invaluable partnership with NASPO and FAPPO, we were able to build a training course that reaches both state-level and local public procurement professionals. Our experience demonstrates that with strategic collaboration, modern digital tools, and effective communication, any state or governmental entity in the U.S. can replicate this initiative to expand and modernize its procurement workforce development.

One of the first enhancements we made to ensure program scalability was transitioning from an outdated, manual database to a modern, cloud-based solution built in Airtable. With help from our information technology (IT) team, we created a database that supports increased enrollment volume and tracks certifications efficiently. This platform, as well as similar database tools, can be customized, making it ideal for other state procurement offices.

We also updated some of our online testing and proctoring processes and procedures to allow for automation, which enables us to deliver exams without relying on in-person staff availability or physical testing centers. States with limited training personnel can particularly benefit from this approach. When our participant volume increased, we worked with our proctoring vendor to shorten test windows and scale service delivery, a strategy any state can negotiate with its vendors to meet growing demand.

Another core enhancement was the shift to digital certification, which has streamlined our operations, reduced costs, and improved customer experience. Upon course completion and exam verification, digital certificates are generated and sent directly to participants from our certification database. This eliminated the need for printing, mailing, and physical tracking, thereby delivering immediate time and cost savings. Digital certification is broadly adaptable and highly recommended for states seeking efficiency.

The FCCM training expansion is not just a Florida innovation; it is a flexible and replicable model for other states. It demonstrates how existing partnerships, cloud-based tools, and streamlined digital processes can modernize public procurement training in a way that scales to include both state and local government staff. This initiative sets a benchmark for other



states to follow and proves that meaningful innovation in procurement education is well within reach nationwide.

Service Improvement

The expansion of the FCCM course to include Florida's governmental entities has resulted in substantial operational improvements for the State of Florida, with measurable gains in efficiency, service delivery, and stakeholder engagement. This effort has significantly improved our ability to meet the growing training needs of procurement professionals across the state, particularly at the local level, while enhancing internal workflows and promoting long-term service sustainability.

Through the expanded FCCM program, including our September 2024 pilot, we will train 235 governmental entity staff members by the end of fiscal year 2024-2025. Starting in fiscal year 2025-2026, we plan to offer 10 sessions per year (5 per semester) with 70 seats per class, totaling 700 available seats annually. This represents a 67% increase in training capacity and reflects our improved ability to deliver consistent, high-quality training to a much broader audience.

We achieved this growth by implementing several efficiency-driven changes:

- The digital certification process saves our team five hours every other month, eliminating the need to collect, sort, and distribute physical certificates.
- By shortening testing windows, we enable instructors to close out courses and prepare for upcoming courses more effectively. Students also receive their certifications faster, improving overall satisfaction.
- A redesigned curriculum, focused exclusively on contract management, allowed us to condense the course from three days to two. This not only reduces the time commitment for participants but also enables us to offer more frequent sessions.
- The introduction of a modern, cloud-based database (Airtable) allows multiple program users to access and update records in real-time. The previous system was plagued by access limitations and software issues that delayed processing and frustrated both staff and participants. The new system ensures faster certification tracking and fewer interruptions to service delivery.

Our partnership with FAPPO has also improved operations by creating a new communication network with local government procurement professionals. FAPPO helped us identify and engage local staff for the pilot course, and these relationships have since grown into an active, ongoing dialogue. Local officials now regularly reach out to the state office with questions, feedback, and training needs, something that rarely occurred before this program. This engagement not only validates the value of the program but also sets the stage for future training expansion.

Thanks to these improvements, we are now planning to launch additional offerings, such as the Florida Certified Contract Negotiator (FCCN) course in August 2025 in collaboration with NASPO and FAPPO. This expansion is a direct result of the operational capacity and stakeholder relationships built through the FCCM program.



The FCCM initiative has transformed our internal operations and deepened connections with stakeholders statewide. Through careful change management, strategic collaboration, and measurable efficiency gains, Florida has achieved a higher standard of service delivery—an achievement that directly aligns with the goals of operational excellence in public procurement.

Savings & Efficiency

In an effort to improve program efficiency and increase instructional capacity, our curriculum design team restructured a key course offering, reducing its length from three days to two. This change enables instructors to offer more sessions per semester, significantly increasing course availability and resource utilization. This results in a 64% increase in course offering and translates to a cost savings of \$96,000 where instructors are able to present more courses for the same average salary rate of \$32.17 per hour.

In addition to instructional improvements, we have transitioned from printed certificates to digital credentials, yielding an annual cost savings of over \$2,000. This figure is based on specific and documented line-item savings: \$750 previously spent on paper, \$75 on envelopes, \$90 on postage, and \$240 on printing costs. Most notably, we are saving approximately \$860.40 (30 hours) annually in staff time that was formerly required to coordinate with contractors and handle certificate logistics. This staff time has since been reallocated to support other bureau initiatives, further enhancing organizational productivity.

The implementation of a new database system has also resulted in significant process improvements. The previous system allowed only one user at a time and frequently suffered from code loss, requiring weekly intervention from IT staff. The new system supports simultaneous access for multiple users and has eliminated code-loss issues, reducing delays and ensuring smoother day-to-day operations. Although harder to quantify in exact dollar terms, these changes have markedly reduced downtime and improved staff workflow.

Finally, by shortening the exam window to 24 hours for initial tests and 20 hours for retakes, we have streamlined the certification process without compromising accessibility for students. This change enables instructors to finalize course data more quickly, ensuring the timely closure of each session and smoother transitions into subsequent classes. Collectively, these well-documented changes reflect a thoughtful balance of cost-saving measures and strategic efficiency improvements.

Conclusion

The MOU-based partnership with NASPO and FAPPO, and the resulting expansion and digitization of our FCCM training program, represents a transformational contribution to the procurement function in Florida. It embodies originality, creativity, and impact—hallmarks of innovation—and serves as a replicable model for other states. By delivering relevant, scalable, and inclusive training, this initiative not only strengthens procurement practices across all levels of government but also demonstrates how cooperative innovation can set a new benchmark for professional excellence.





State of Georgia

Department of Administrative Services
State Purchasing Division

2025 George Cronin Awards for Procurement Excellence

GA Procurement @ WORK



Executive Summary

It is with great enthusiasm the State of Georgia provides a request to be nominated for the NASPO George Cronin Award in recognition of the project initiative, *GA Procurement @ WORK*. This project exemplifies innovation, strategic thinking, and cross-functional collaboration, and it sets a benchmark for elevating the procurement profession across the public sector.

Recognizing the challenges of recruiting talent into traditionally hard-to-fill positions, the State of Georgia launched a statewide initiative to better understand workforce gaps and uncover new ways to promote and attract talent to critical public service roles. Procurement quickly emerged as one of the most misunderstood and under-recognized professions among the general population.

Rather than jumping directly to recruitment strategies, Georgia's State Purchasing Division, in partnership with Chandley Communications and a cross-agency team, first sought to address the foundational challenge: a widespread lack of awareness and understanding of what procurement is—and more importantly, the exciting, diverse opportunities the field offers.

Through statewide surveys and focus groups spanning all ages, education levels, and socioeconomic backgrounds, the team discovered that most individuals had no idea what procurement professionals do. However, once participants were introduced to the range of roles, educational backgrounds, and career paths available within procurement, their reactions shifted from confusion to genuine interest and enthusiasm—highlighting the untapped potential of this awareness-building effort.

Leveraging these insights, the team developed a multi-phase strategy to rebrand and reintroduce the procurement profession to the public. They wrote scripts, filmed spotlight videos across various agencies—including the University System of Georgia, Department of Natural Resources, and Georgia Department of Transportation—and showcased real stories and diverse career paths within procurement.

To ensure consistency and recognition, the team also developed a visual identity for the initiative. The brand, *GA Procurement @ WORK*, now features prominently across the state, including on every purchase order and an expanding social media presence. These social platforms link to a dedicated web landing page where visitors can learn more about procurement, explore career opportunities, and access information about training and certifications available through state employment.

GA Procurement @ WORK is more than a branding campaign—it is a model for how states can revitalize interest in public sector careers by starting with education, awareness, and storytelling. It aligns perfectly with the values of the George Cronin Award by demonstrating leadership, collaboration, and a long-term vision for the procurement profession.

We proudly submit our request for nomination of the Georgia Procurement@WORK for this prestigious honor. We believe this innovative approach to creating a sustainable talent pipeline for procurement and public service at large.

Innovation

The GA Procurement @ WORK initiative showcases an innovative approach to revitalizing the procurement profession within the public sector. Recognizing the dire need for skilled professionals in traditionally hard-to-fill positions, the State of Georgia embarked on this groundbreaking project to bridge the gap in understanding the procurement field. By taking the proactive step of conducting statewide surveys and focus groups, the initiative not only identified misconceptions but also unveiled a wealth of enthusiasm for the diverse opportunities available within procurement. This foundational understanding allowed the team to craft a strategic response that goes beyond mere recruitment strategies.

Instead of focusing solely on filling vacancies, Georgia's State Purchasing Division, in collaboration with key partners, took on the vital task of rebranding procurement. Through innovative storytelling, they created compelling spotlight videos and engaging narratives that highlight the dynamic roles and impactful contributions of procurement professionals across various agencies. This storytelling approach—coupled with a cohesive visual identity—set a new standard for public sector engagement, transforming how procurement is perceived. The initiative's branding, prominently displayed on purchase orders and social media platforms, serves as a constant reminder of the crucial role procurement plays in public service.

Moreover, the dedicated web landing page expands access to crucial resources, allowing individuals to explore career paths, training opportunities, and certifications. GA Procurement @ WORK goes beyond a simple marketing endeavor; it represents a paradigm shift in how states can attract and nurture talent in the public sector. By prioritizing education and awareness, Georgia's initiative exemplifies the leadership and collaboration that the George Cronon Award seeks to recognize, demonstrating a comprehensive and sustainable approach to building a talented workforce for the future of procurement.

We also started educating key personnel in K-12 and higher education, putting procurement in their curriculum, so that younger generation start hearing “procurement is a profession” and not just supply chain management. We have one college that has agreed to a pilot the Ga procurement certification into their curriculum so that graduating student would come out with the Georgia basic certification credentials.

Below is one sample of a script entitled “First there's Procurement” this short video feature one of our overpasses which is on a major artery into Atlanta and the day it collapses by fire. The video shows the remaking of the bridge in the background with the emphasis before the bridge is built there's procurement.

Exhibit 1

Georgia Procurement @ Work

:30 TV

Title: First There's Procurement

Date: May 22, 2025

VIDEO	AUDIO
Start with sweeping video footage of a bridge in GA - it's fluidly and smoothly moving forward then stops, as the footage 'rewinds' to show us 'how it all began' (NOTE: we envision this concept being a series that we can vary the opening 'project' beyond just a bridge and into other areas of procurement work)	Before the bridge is built...
Logo + tagline page as transition to core of the spot	Procurement makes it possible...
This is a mix of B-roll shots of real Procurement staff in a variety of jobs - they don't necessarily have to be doing exactly what is described - the main goal is to clearly show a variety of job roles and the contributions of many.	We collect the bids...
B-roll of contributions of staff continues	Find the crew...
B-roll of contributions of staff continues	Secure the permits...
B-roll of contributions of staff continues	Negotiate with suppliers...
B-roll of contributions of staff continues	Dot all the I's and cross all the T's to make great things happen in Georgia!
Here, we begin to fill the screen with squares/blocks of video footage of various staff looking straight at camera in a 'live portrait' style of shooting - we're filling the screen with these video blocks as we hear the announcer VO	Georgia Procurement @ Work is a diverse team - from entry level to seasoned professionals - working together to benefit a wide range of vital organizations and public projects.
Transition to full screen of this question before segue into end page to close with URL prominent, logo and tagline on screen. georgiaprocurement@work.com	If you're ready for an exciting and rewarding career path - Join Us!
- End -	Visit Georgia Procurement at Work dot com today!

Transferability

The GA Procurement @ WORK initiative exemplifies a robust framework that can be effectively transferred to other states seeking to enhance their public procurement workforce. At its core, this project emphasizes the importance of addressing misconceptions and raising awareness about the procurement profession—steps that are universally applicable regardless of geographic location. The methodology employed in Georgia, including the use of statewide surveys and focus groups, can be replicated in other states to identify local perceptions and gaps in understanding surrounding procurement roles.

Other states can adapt the initiative's narrative-driven approach to rebranding procurement through storytelling, focusing on local success stories and diverse career paths within their unique contexts. By collaborating with cross-agency teams and leveraging local partnerships—such as educational institutions and professional organizations—states can create tailored content that resonates with their communities, fostering greater interest in procurement careers.

Furthermore, the initiative's emphasis on a strong visual identity and a dedicated online presence can serve as a model for states aiming to establish consistent branding in their outreach efforts. Creating engaging social media content and user-friendly web resources can facilitate access to information about procurement job opportunities and training programs, thus fostering a more informed candidate pool.

Overall, the principles of awareness-building, strategic collaboration, and adaptive communication showcased by GA Procurement @ WORK provide a blueprint for other states seeking to invigorate their procurement workforce. By implementing similar strategies, states can cultivate a sustainable talent pipeline, ultimately enhancing the effectiveness and reputation of the procurement profession across the public sector.

Service Improvement

The GA Procurement @ WORK initiative directly improves public service in several key ways:

- 1. Enhanced Workforce Quality:** By attracting a more diverse and knowledgeable pool of procurement professionals, the initiative helps to ensure that public agencies are staffed with individuals who are well-equipped to make informed and strategic purchasing decisions. A well-trained workforce can lead to better negotiation outcomes, increased cost savings, and more efficient procurement processes, ultimately enhancing the overall quality of services provided to the public.

2. Increased Awareness and Engagement: The project effectively raises public awareness about the crucial role that procurement plays in government operations. By demystifying the profession and showcasing its importance through storytelling and real-life examples, it fosters a greater appreciation for procurement among citizens and stakeholders. This increased transparency can lead to improved trust in public institutions and greater citizen engagement in governmental processes.

3. Stronger Collaboration Across Agencies: The cross-agency collaboration inherent in the GA Procurement @ WORK initiative fosters a culture of teamwork and shared goals in managing public resources. This collaboration can break down silos, leading to more cohesive strategies that ultimately benefit public service delivery. When agencies work together, they can share best practices, create synergies, and respond more effectively to community needs.

4. Sustainable Talent Pipeline: By focusing on education and awareness, the initiative creates a sustainable talent pipeline that ensures the procurement profession has a continuous influx of skilled professionals. This stability helps to avert staffing shortages that can disrupt procurement activities and delay public service projects. A consistent talent supply means that agencies can maintain high service standards over time.

5. Improved Service Delivery: Ultimately, a well-informed and capable workforce can respond more effectively to the needs of public service. With qualified procurement professionals who understand the complexities of their roles and the impact of their decisions, agencies can improve service delivery, better meet community needs, and enhance the overall effectiveness of government operations.

By implementing a rigorous and strategic approach to recruitment and outreach, the GA Procurement @ WORK initiative thus lays the groundwork for a more effective, transparent, and efficient public service that ultimately benefits the citizens of Georgia and serves as a model for other states aiming to achieve the same enhancements in governance.

Savings & Efficiency

The GA Procurement @ WORK initiative not only revitalizes the procurement profession but also leads to significant savings and increased efficiency within public service. By attracting a well-informed and skilled workforce, the initiative empowers procurement professionals to make more strategic decisions that optimize resource allocation and reduce waste. As these professionals become adept at identifying cost-effective solutions and negotiating favorable contracts, they contribute directly to substantial cost savings for state agencies.

Furthermore, the emphasis on cross-agency collaboration fosters a more streamlined procurement process, eliminating redundancies and reducing time spent on acquiring goods and services. A knowledgeable procurement team equipped with best practices can ensure that purchases are made efficiently, thereby accelerating service delivery to the public. By improving the speed and accuracy of procurement operations, agencies can respond more swiftly to community needs, enhancing overall public service effectiveness.

Additionally, the increased awareness and understanding of procurement roles among potential candidates lead to a stronger talent pipeline, minimizing turnover and the associated costs of hiring and training new employees. This stability translates to a more experienced workforce that can implement continuous improvement practices, driving further efficiencies in procurement processes.

In essence, GA Procurement @ WORK exemplifies how strategic workforce development can lead to significant financial savings and improved operational efficiency, ultimately resulting in a more fiscally responsible and responsive government, better serving the needs of the community.

The value is also transferable to state employees, the short video showcasing their work in the field is motivating and inspiring. It provides a new sense of pride in the workforce. What value can you place on that?

Conclusion

In conclusion, the GA Procurement @ WORK initiative stands as a transformative model for enhancing the procurement profession within the public sector. Through its innovative approach to raising awareness, building a sustainable talent pipeline, and fostering cross-agency collaboration, Georgia has set a standard for other states to follow in addressing

workforce challenges and improving public service delivery. The initiative not only highlights the critical importance of procurement but also demonstrates how strategic investments in workforce education and engagement can lead to significant savings and efficiencies. By repositioning procurement as a dynamic and impactful career path, Georgia has opened the door to untapped potential, ultimately benefiting public agencies and the communities they serve. As states look to modernize and elevate their procurement functions, the lessons learned from GA Procurement @ WORK offer invaluable insights for cultivating a capable and committed workforce, driving excellence in public service for years to come.

Administrative Services, Department of
200 Piedmont Avenue SE
West Tower, Suite 1820
Atlanta, GA 30334
United States of America



Purchase Order

Purchase Order #:	40300POR223
Purchase Order Date:	2025-05-20
Buyer:	Carrie Steele
Phone Number:	+1 (404) 4227473
Email:	x.carrie.steele@doas.ga.gov

Supplier Information:

Name: STAPLES CONTRACT & COMMERCIAL INC
Address: Test Address By LP
Atlanta, GA 30033
United States of America
Contact: STAPLES CONTRACT & COMMERCIAL INC
Payment Terms: Net 30

Shipping Information

Address: **See Lines for shipping addresses and note that in some cases, they potentially might vary from line to line**
Contact: Mark Meeks
Email: x.carrie.steele@doas.ga.gov
Phone: +1 (404) 4227473

Comments / Supplier Instructions

Billing Information

Company: Administrative Services, Department of
Address: 200 Piedmont Avenue SE
West Tower, Suite 1820
Atlanta, GA 30334
United States of America
Contact: Quinton Murphy
Phone: +1 (404) 6576023
Email: accounts_payable1212@doas.ga.gov

Currency	Total Lines Amount	Total Tax Amount	Freight Amount	Other Charges	Total PO Amount
USD	\$131.45	\$0.00	\$0.00	\$0.00	\$131.45

Shipping Terms	Shipping Method	Shipping Instruction
FOB Destination	Common Carrier	Best Shipping Method

Line #	Supplier Contract ID	Ship To Address	Description	Due Date	Qty	Unit	Unit Cost	Extended Amt
1	SWC601 : 99999-SPD-SPD0000167-0001A_GENERA/ OFFICE SUPPLIES	DOAS State Purchasing 200 Piedmont Avenue Suite 1804W Atlanta, GA 30334	Ticonderoga The World's Best Pencil Wooden Pencil, 2.2mm, #2 Soft Lead, 96/Pack (13872/13882)	6/19/25	5	Pack	\$20.50	\$102.50
2	SWC601 : 99999-SPD-SPD0000167-0001A_GENERA/ OFFICE SUPPLIES	DOAS State Purchasing 200 Piedmont Avenue Suite 1804W Atlanta, GA 30334	Paper Mate Arrowhead Cap Erasers, Pink, 144/ Box (73015)	6/19/25	5	Box	\$5.79	\$28.95

Additional Information and Comments:

Please reference the Terms and Conditions link: <https://doas.ga.gov/assets/State%20Purchasing/NEADocumentLibrary/GAStandardTerms-ConditionsforSuppliers.pdf>

Purchase Order Number must appear on all correspondence, invoices, shipping papers and packages.

Authorized Signature:



State of Maryland

Department of General Services
Office of State Procurement

2025 George Cronin

Awards for Procurement Excellence

**Embedding Innovation:
Maryland's Innovation &
Continuous Improvement
Team as a Blueprint for
Modern Procurement**

Executive Summary

In August 2024, the Maryland Office of State Procurement (OSP) established its first Innovation and Continuous Improvement (ICI) Team, a strategic initiative created to modernize procurement operations through a human-centered approach. Designed to reduce inefficiencies, improve collaboration, and support agile project delivery, the ICI Team fills a critical operational gap by serving as an internal consulting and facilitation resource focused on organizational performance, workforce resilience, and long-term value creation.

The ICI Team was born out of a clear need: procurement functions across OSP were constrained by inconsistent processes, lagging project management, and limited capacity to lead change. This dedicated unit was developed to address those gaps—bringing with it professional expertise in Lean Six Sigma, Agile methodologies, and public sector contracting. The team's mission is to transform state procurement into a more responsive, efficient, and human-centered system, while ultimately returning greater value to Maryland taxpayers.

Though the ICI Team is embedded within OSP, its scope is statewide in impact. By improving the central procurement office's processes, tools, and strategy, the ICI Team contributes to a stronger procurement ecosystem across Maryland's agencies. Early successes include enhanced project management practices, smarter use of existing technology, and high-profile initiatives such as the nation's first public procurement apprenticeship program, along with instrumental support in advancing statewide procurement reform through executive and legislative actions.

This submission highlights four core areas:

- **Innovation:** The team represents a meaningful investment in applied innovation—where resources and authority are aligned to drive measurable outcomes, not just ideas.
- **Transferability:** The ICI model is scalable and replicable for procurement entities in other states seeking to embed continuous improvement into their operations.
- **Service Improvement:** Initial efforts have already streamlined internal workflows and empowered staff, leading to better external results and more effective stakeholder engagement.
- **Savings & Efficiency:** While cost savings data are still being formalized, early indicators show improved time and resource efficiency across key projects.

As NASPO's evaluation committee reviews this submission, we encourage special attention to the ICI Team's role in enabling major structural reforms—including Maryland's 2025 Procurement Reform Act—and its unique ability to blend strategic change management with day-to-day operational support. This effort stands as a promising blueprint for modernizing public procurement in a way that is inclusive, iterative, and sustainable.



Innovation

The creation of Maryland's Innovation and Continuous Improvement (ICI) Team marks a bold shift in how the state approaches procurement reform—from reacting to inefficiencies to proactively redesigning systems. Rooted in human-centered design and guided by Lean Six Sigma and Agile methodologies, the ICI Team is more than a process improvement initiative; it is a structural innovation aimed at institutionalizing creativity, collaboration, and continuous learning within the Office of State Procurement (OSP).

What makes the ICI Team exceptional is not just its mission, but the fact that it is *resourced, skilled, and permanent*. In contrast to temporary task forces or external consultants, the ICI Team provides sustained, internal capacity to manage large projects, reduce lag time, and foster systemic change. This model empowers OSP to take control of its evolution rather than waiting for outside pressure or crisis to drive reform. As one example of this proactive approach, the ICI Team introduced a 120-day Milestone Status Portfolio (MSP) tool to create visibility into procurement timelines, introduce built-in escalation points, and improve accountability across the enterprise.

The ICI Team stands apart through its unique combination of expertise and empathy. Rather than imposing top-down solutions, the team collaborates deeply with subject matter experts, process owners, and front-line staff to map current workflows and co-design improvements. This participatory model has helped build trust, especially among staff who initially worried the team would act as internal auditors. Instead, the team has earned credibility as a reliable and respectful partner—one focused on listening first, and improving together.

The innovation extends to training, communication, and knowledge-sharing as well. The ICI Team launched the state's first contract monitoring eLearning module, experimented with analytics-based training formats, and created tools like a data request form and training needs worksheet to formalize, streamline, and democratize access to critical internal resources. They also transformed the state's largest procurement certification program into an asynchronous learning experience, dramatically expanding access and accelerating delivery timelines.

Perhaps most importantly, this initiative is reshaping the culture of public procurement in Maryland. Staff are now seeing that their feedback matters and that process design can—and should—center their voices. This cultural shift is setting the stage for broader transformation, as seen in the ICI Team's support for statewide procurement reforms under the Moore-Miller Administration, including the December 2024 Executive Order and the 2025 Procurement Reform Act.

If another state adopted Maryland's model, the most immediate impact would be improved internal communication, more transparent workflows, and measurable gains in efficiency—all built on a foundation of trust and co-creation. This is not just a new initiative; it is a new way of thinking about public service, one that makes innovation a shared responsibility and continuous improvement a standard operating principle.



Transferability

Maryland's Innovation and Continuous Improvement (ICI) Team offers a replicable and adaptable model for modernizing procurement functions—one that can scale to meet the needs of any public procurement office, regardless of size, structure, or resource constraints. While the ICI Team is embedded within Maryland's Office of State Procurement (OSP), its foundational elements are universal and transferable: a focus on project and process improvement, commitment to human-centered design, and the use of proven tools like Lean Six Sigma and Agile frameworks.

Organizationally, the model can be adopted as either a full team—as Maryland has done—or a smaller strike team focused on a specific pilot area. States with fewer resources or narrower scopes can begin with just one or two staff and still achieve meaningful impact, especially by aligning early efforts with high-impact or high-visibility initiatives. Many of the ICI Team's successes have grown organically from this type of focused approach, eventually expanding to serve more of OSP's internal and external functions. This demonstrates the model's flexibility to start small and evolve without requiring major structural overhauls.

Methodologically, the ICI Team's reliance on transferable skills such as project management, critical thinking, and communication means that its success does not depend on deep procurement knowledge from day one. In fact, Maryland's model emphasizes learning through collaboration—engaging existing subject matter experts as partners and co-designers of improvement efforts. This makes the team's approach well-suited to both centralized and decentralized procurement environments.

The tools and deliverables developed by the ICI Team also enhance transferability. These include:

- A 120-day Milestone Status Portfolio (MSP) tool for process tracking and visibility
- Contract monitoring eLearning modules to support statewide training
- Data request forms and training needs worksheets that streamline communication and clarify resource needs
- Standard operating procedures and asynchronous learning formats that increase access and consistency across teams

These resources can be shared and adapted by other states with minimal reconfiguration. And OSP is committed to doing just that—whether through formal consultation, peer exchange, or open access to templates and materials. This commitment is already in motion, with the ICI Team's work presented at the 2025 State Training Coordinators Conference in Providence, RI, and early conversations with peers indicating clear interest in adopting similar approaches.

Ultimately, what Maryland offers is a framework, not a formula—one that other states can tailor to their own environments. Whether improving internal communication, elevating training programs, or embedding continuous improvement in day-to-day operations, the ICI model proves that innovation in procurement doesn't require reinvention—it just requires intent, structure, and trust. This is a solution that's ready to be replicated.



Service Improvement

The Innovation and Continuous Improvement (ICI) Team has already begun delivering measurable improvements in the quality, speed, and clarity of services provided by Maryland's Office of State Procurement (OSP). Though still in its early stages, the ICI Team has made significant strides in transforming how procurement professionals and agency partners experience training, project management, and internal communication.

Training and instructional programs are one of the clearest areas of improvement. The ICI Team has revamped the development process for learning resources to include more participant input, making courses more responsive, relevant, and user-friendly. From asynchronous certification programs to targeted modules on contract monitoring, OSP's training is increasingly shaped by the voices of those who use it—resulting in improved engagement, increased access, and quicker onboarding for procurement staff.

Project management practices have also seen important early gains. With the introduction of structured tools like the Milestone Status Portfolio (MSP), OSP is beginning to bring greater clarity and predictability to procurement timelines. While project management remains an area for continued growth, the adoption of milestone-driven planning and production schedules has helped streamline expectations and support on-time delivery. These tools are being introduced thoughtfully—with supplemental aids like tutorial videos and pilot rollouts—to ensure smooth adoption by staff and stakeholders.

Communication improvements—often undervalued but critically important—have also been a standout contribution of the ICI Team. By facilitating more structured collaboration across Procurement Operations, Infrastructure, and Improvement, the team is helping reduce misalignment and prevent bottlenecks before they start. Even small changes, such as moving manual forms to online fillables, have led to faster processing times, fewer submission errors, and improved user experiences for internal staff and agency clients alike.

These improvements are not hypothetical—they're backed by early indicators of success. For example:

- The transition to digital forms has led to shorter processing timelines and reduced data entry errors.
- New training formats have shown increased participation and engagement, especially among staff who previously had limited access to in-person programs.
- Cross-functional feedback has become a more routine part of tool development, making solutions more effective and better aligned with day-to-day needs.

To promote adoption, the ICI Team has applied lightweight but effective change management strategies, including stakeholder briefings, video explainers, and pilot testing where applicable. The team has focused heavily on building trust, often inviting frontline staff to co-develop or test tools before broader rollout. This approach has helped shift perceptions of innovation from disruption to collaboration. As the ICI Team matures, its focus on practical, user-driven solutions is already delivering internal wins and laying the groundwork for long-term transformation in how Maryland delivers procurement services.



Savings & Efficiency

While the ICI Team is still in its first year, it has already demonstrated clear progress in improving efficiency, reducing administrative burden, and positioning OSP for long-term cost savings. The team's early initiatives have targeted processes that drain staff time, delay outcomes, and introduce risk—yielding measurable reductions in effort and timeline even without additional funding or new technology investments.

One standout example is the streamlining of the Procurement Review Group (PRG) intake process, which previously relied on a cumbersome 12-page, manually submitted form. This system frustrated users and consumed significant administrative bandwidth. The ICI Team redesigned the intake workflow into a concise, online fillable form with auto-populated fields and automatic data logging. While formal impact data is still being collected, the change has already reduced manual administrative burden by an estimated 60%, freeing PRG staff to focus on value-added analysis and faster turnaround for external customers.

These early projects show clear potential to improve resource allocation and staff capacity across the organization. By simplifying or automating manual steps, staff now spend less time on error-prone clerical tasks and more time on strategic responsibilities and cross-functional collaboration.

The ICI Team has also targeted forms that historically triggered disqualifications for prospective bidders due to minor irregularities—sometimes resulting in higher-cost contract awards. By redesigning these forms to be clearer and more user-friendly, OSP reduces the risk of disqualification errors and preserves the opportunity to award contracts to the lowest responsive bidder, a future-facing change with high potential for downstream cost savings.

Efficiency gains have been supported by basic tools and existing technology—not by added cost. Rather than request new resources, the ICI Team has focused on optimizing current systems through better design, smarter workflows, and effective user engagement.

As ICI continues to develop internal metrics and tracking mechanisms, its work promises not just increased efficiency, but also a stronger foundation for strategic spending, cost avoidance, and greater return on taxpayer investment.



Conclusion

The creation of Maryland's Innovation and Continuous Improvement (ICI) Team marks a bold investment in the future of public procurement. In less than a year, the team has already laid the groundwork for more efficient, equitable, and human-centered processes that benefit internal staff and external stakeholders alike. Through practical, scalable innovations, the ICI Team has enhanced communication, reduced redundancies, improved service delivery, and set the stage for measurable cost savings. As the work continues to mature, the team's adaptable model and strategic mindset offer a blueprint not just for Maryland, but for any state seeking to modernize procurement from within. The ICI Team embodies the principle that innovation in government isn't just possible—it's essential.





State of Massachusetts

Operational Services Division
Climate and Sustainability Unit

2025 George Cronin

Awards for Procurement Excellence

**Driving Vendor Sustainability
Through Public Procurement:**
*The Climate and Environmental Practices
(CEP) Form*

Executive Summary

The Commonwealth of Massachusetts' [Climate and Environmental Practices \(CEP\) Form](#),¹ launched in January 2025, represents a significant advancement for sustainable procurement. Developed and implemented by the Operational Services Division's (OSD) Climate and Sustainability Unit, the CEP Form is a mandatory component of all Statewide Contract solicitations. It reinforces Massachusetts' commitment to environmentally preferable purchasing and aligns procurement with the state's broader climate and environmental objectives. The CEP Form assesses a vendor's sustainability performance across four key areas:

- **Sustainability Policies:** Whether the vendor has a formal policy outlining its environmental commitments.
- **Climate and Environmental Practices:** Operational efforts to reduce environmental impacts, including energy efficiency, waste reduction, low-emissions transportation, etc.
- **Monitoring Efforts:** Systems for tracking climate and environmental performance, setting targets and reporting progress.
- **Certifications and Awards:** Organizational-level environmental certifications and recognitions (e.g., ISO 14001, UN Global Compact), excluding product-specific certifications.

To support accurate completion, it is accompanied by a detailed vendor [guidance document](#) and [training video](#).

Vendor sustainability has long been a consideration in statewide procurements in Massachusetts. Vendors were previously asked to provide information on their environmental practices during the bid process—a reflection of the Commonwealth's early commitment to broadening sustainability considerations beyond individual products and services. However, sustainability questions varied across solicitations, full completion of the questionnaire was not required for responsiveness, and the data collected was used only for immediate evaluations and not retained or analyzed.

The CEP Form introduces a standardized, data-driven format that not only supports bid evaluations but also feeds into a centralized vendor sustainability database. This enables the Commonwealth to:

- Identify trends and common gaps across vendors,
- Monitor progress over time through required annual updates, and
- Provide vendors with annual environmental performance scorecards to benchmark and improve practices.

This submission highlights the project's value in four key areas:

Innovation - The CEP Form embeds vendor sustainability directly into the bid evaluation process as a mandatory, scored, and analytics-enabled tool. It transforms procurement into a strategic driver of climate action.

Transferability - Delivered in an Excel® spreadsheet format with guidance and training, the form is not tied to Massachusetts-specific systems and can be easily adapted by other states, agencies, or sectors.

Service Improvement - The form standardizes environmental evaluation criteria, streamlines procurement staff workflows, and provides better insight into vendor practices, leading to more informed purchasing decisions.

Savings & Efficiency - Standardization reduces the time needed to develop and evaluate sustainability sections in solicitations. Encouraging sustainable vendor practices also supports long-term cost avoidance through more efficient resource use and improved waste management.

¹ The CEP Form can be found on the linked webpage under "Climate and Environmental Practices Form."

Innovation

Massachusetts is the first state to implement a mandatory, standardized, and analytics-driven tool that captures and applies environmental performance data across its entire vendor base. While many procurement programs encourage sustainability, few—if any—have established a uniform tool that integrates organizational environmental performance into every statewide contract. The CEP Form is not optional; vendors must complete it in full to be deemed responsive, shifting sustainability from a “nice to have” to a baseline requirement.

To develop the CEP Form, the Commonwealth reviewed leading sustainability performance tools from across government, industry, and international organizations. The result is a fit-for-purpose solution tailored to public procurement, with a structure flexible enough for other sectors to use as a business self-assessment tool.

Standardization allows for consistent, comparable data collection across all solicitations, eliminating previous fragmentation and enabling scalable analysis. More than just a bid evaluation tool, the CEP Form populates a centralized database of vendor sustainability practices, updated annually by awarded vendors.

This data-driven feedback loop enables the Commonwealth to:

- Identify sustainability trends and common gaps across vendors and contract categories,
- Monitor performance over time through annual updates,
- Provide vendors with annual environmental performance scorecards to benchmark and improve practices, and
- Inform future policies and solicitations using real-world data.

By embedding sustainability analytics into procurement strategy, Massachusetts is pioneering a scalable model for climate-conscious, data-informed purchasing.

Transferability

While the CEP Form was developed to meet the specific sustainability goals of the Commonwealth of Massachusetts, its structure and implementation make it highly transferable to other states or public entities seeking to integrate vendor sustainability criteria into their procurement processes.

1. Broad Relevance and Peer Benchmarking Potential

The CEP Form addresses universal procurement challenges—how to assess, compare, and improve vendor environmental performance. As a result, it offers other states a ready-made framework for introducing sustainability into procurement in a consistent and accountable way. Widespread adoption could also enable benchmarking across jurisdictions, fostering shared best practices and collaborative progress in sustainable procurement nationwide.

2. Practical and Adaptable Format

The CEP Form is delivered in a user-friendly Excel® spreadsheet format and is accompanied by a detailed vendor [guidance document](#) and [training video](#) to support accurate completion. It consists of a standardized set of sustainability-related questions designed to be applicable across all contract categories. Vendors are required to substantiate their responses with evidence that supports their organization’s sustainability claims. The form includes built-in formulas that apply weighted scores to each section, allowing procurement officials to simply validate responses based on the provided documentation. These weighting factors can be easily modified to align with the specific policy priorities or procurement frameworks of other jurisdictions, enhancing the form’s adaptability and relevance across different contexts.



3. No Specialized Systems Required

Adoption of the CEP Form does not require a proprietary software platform or a centralized database. It can be integrated into existing procurement workflows, and implemented at any level of government—local, regional, or statewide. This allows for broad applicability across different governmental structures and operational contexts. Beyond the public sector, the form can also be adapted for use in other industries or serve as a sustainability self-assessment tool for businesses.

4. Resource-Light Implementation

Because the form and accompanying guidance materials are already developed, other states can easily repurpose and adapt these tools without building a program from the ground up. OSD has also created CEP Form training slides for procurement officials and a process flow that can be shared to support implementation. This form-based initiative can be launched with minimal staffing and administrative effort, making it especially accessible for procurement offices with limited resources but strong sustainability goals. As capacity and data needs grow, the program can be scaled accordingly.

5. Scalable for Deeper Analysis and Policy Impact

While the CEP Form is currently being used in Massachusetts to support both bid evaluation and broader sustainability tracking, other states may choose to implement it initially as a standalone evaluation tool and evolve toward more advanced data collection and performance monitoring. Its modular design supports flexible implementation, from a basic inclusion in solicitations to integration into comprehensive sustainability scorecards or vendor tracking systems.

Service Improvement

The introduction of the CEP Form has significantly improved the effectiveness, consistency, and strategic value of procurement services provided by OSD. By streamlining sustainability evaluation, increasing transparency, and enabling long-term performance tracking, the CEP Form strengthens the overall quality and responsiveness of the state's procurement function.

1. Standardization for Efficiency and Data Analytics

Prior to the CEP Form, environmental questions were customized for each solicitation, and vendors were not required to answer all questions to be considered responsive. Additionally, no data was tracked or analyzed systematically beyond the immediate bid evaluation.

The new CEP Form introduces a uniform, mandatory set of sustainability questions for all statewide contracts, which:

- Ensures consistent application of environmental standards, and
- Creates a level playing field for all vendors.

This standardization has streamlined internal workflows and enabled procurement teams to focus more on strategic sourcing rather than designing bid-specific sustainability frameworks.

2. Stakeholder Engagement in Design and Rollout

Stakeholder input was central to the development and rollout of the CEP Form. OSD collaborated closely with internal teams, including contract managers, legal counsel, performance analytics, and training staff, as well as with the vendor community. A pilot phase was conducted to test the form's relevance, feasibility, and applicability across diverse industries, business types and organization sizes. Stakeholder feedback directly informed refinements to the form's language, structure, and scoring methodology, helping to ensure clarity, fairness, and practicality, as well as the internal workflow for evaluating and scoring responses.



To support successful adoption, OSD delivered targeted training sessions for its category managers and incorporated CEP Form content into external training for vendors and buyers. These efforts helped build early buy-in, reduce confusion, and ensure compliance from the start.

3. Data-Driven Improvement and Ongoing Value

One of the most impactful service improvements comes from the data collection capabilities of the new CEP Form. Because all vendors must now answer every question in a consistent format, OSD can systematically collect and analyze data to identify:

- Common vendor strengths and weaknesses,
- Market trends in sustainability practices,
- And opportunities to target support.

This feedback loop allows OSD to continuously refine procurement practices and provide vendors with valuable insights on vendor performance that were previously unavailable.

Savings & Efficiency

The implementation of the CEP Form has introduced measurable efficiencies and resource savings within OSD's procurement operations by reducing administrative burden, improving evaluation consistency, and enabling more strategic vendor engagement. While direct cost savings are still being quantified, early operational efficiencies and the consolidation of vendor data already represent meaningful value for the Commonwealth.

1. Streamlined Bid Development and Evaluation

Standardizing the CEP Form and process has reduced the time procurement staff spend customizing sustainability questions.

2. Improved Vendor Responsiveness Reduces Rework

With the form now mandatory and structured with clear instructions, the quality and completeness of vendor submissions have improved significantly. Previously, incomplete or inconsistent responses often led to follow-ups. The new format reduces back-and-forth communication and administrative rework, creating a more efficient evaluation process for OSD.

3. More Strategic Use of Procurement Resources

The growing database of vendor sustainability performance allows OSD to identify high-performing vendors, underperformers, and industry-wide gaps. This information can inform more targeted technical assistance and vendor outreach—minimizing trial-and-error and increasing the return on investment in contract administration.

4. Long-Term Cost Avoidance through Strategic Environmental Procurement

While the form does not directly address pricing, it supports long-term cost avoidance by promoting environmentally responsible vendors with practices such as energy efficiency, waste reduction, and resource conservation. As this data is integrated into vendor scorecards, agencies will be empowered to make purchasing decisions that deliver environmental value.





State of Michigan

Department of *Technology,*
Management, & Budget Central
Procurement Services

2025 George Cronin

Awards for Procurement Excellence

A-S-B-R-Cadabra

Executive Summary

The State of Michigan strives to be on the cutting edge of procurement practices, and this includes adopting best practices from the private sector. Private sector procurement has many distinct advantages that are not feasible in the realm of public procurement due to the transparency and safeguards needed when operating with public funds.

One area in which Michigan has been able to adopt private sector practices is its implementation of a Supplier Relationship Management section (“SRM”) within Central Procurement Services (CPS). This area was established 8 years ago, and Michigan believes it remains the only state-level public procurement body with such a dedicated team. While there are many traditional SRM functions that cannot work in a public setting, Michigan’s team has worked to incorporate as many best practices as is feasible under our Statutory constraints.

An important concept from the public sector is the active management of relationships with key vendors. Traditionally, this has been an area public sector procurement has often avoided for fear of the appearance of favoritism. However, it’s possible to cultivate and develop these relationships in ways that are ethically and legally permissible. One very effective way is by identifying vendors of high strategic importance, and bringing them, procurement, and the business areas together to regularly discuss potentially mutually beneficial options. Michigan refers to these gatherings as Annual Supplier Business Reviews (ASBR), and they have generated tangible savings and cost avoidance. Further, by learning more about how our industry business models work we can allow us to better shape future solicitations.

Innovation

In a world where technology enables quick and easy virtual chats/discussions/etc., how can a meeting make an impact? Studies have demonstrated the quantifiable value in maintaining interpersonal relationships in the business context. A McKinsey survey of more than 100 large organizations in multiple sectors revealed that companies that regularly collaborated with suppliers demonstrated higher growth, lower operating costs, and greater profitability than their industry peers.¹ Thus, the natural evolution of our SRM team has focused on that goal.

In a traditional SRM program, *strategic* suppliers are identified, typically through quantifiable metrics, such as spend. Upon identification, these suppliers are further stratified/segmented to identify priority vendors that most impact the business. The public sector, concerned with the appearance of impropriety, has kept vendors at increasingly arm’s length. Post-pandemic, and in an increasingly uncertain business environment such distance proves too costly. CPS decided it must work closer with its vendors, strengthening partnerships while maintaining competition. CPS reviewed its portfolio of contracts and identified strategic categories to begin the implementation of ASBRs.

With the vendors identified, CPS developed a plan to coordinate communication with all stakeholder agencies that utilized these contracts and elicit feedback regarding any questions or concerns. CPS has a robust feedback system through which regular feedback is collected

¹ “Taking supplier collaboration to the next level”. McKinsey & Company, <https://www.mckinsey.com/capabilities/operations/our-insights/taking-supplier-collaboration-to-the-next-level>.

from the users. As such, all previous performance data is gathered and analyzed in advance of the meeting. An agenda template² was developed to guide these meetings, including topics that are not commonplace in the traditional transactional model. Candid discussions around industry specific developments, vendor-suggested efficiencies, and forecasted industry risks have proven to be highly enlightening in every instance.

Transferability

Transferability is a chief strength of ASBRs. Whether your state has a devoted SRM resource or not, all the initial steps in following SRM principles have already been established. For ASBRs, identifying strategic suppliers is the most important first step, and there are numerous considerations and methodological approaches that can be considered. Spend, number of contracts held, importance of the services, complexity of the contracts, political visibility, and many other factors can be considered.

The first step is simply to establish an agenda. While this can be fact-specific, CPS's experience has been that a consistent agenda can be reused without much need for industry-specific tailoring. To illustrate, the same structure has been used for ASBR meetings with vendors such as waste removal, advertising, security, and language translation.

Next, feedback should be requested from all stakeholders. Michigan is fortunate to have a system in place that captures documented feedback for all contracts on a regular interval. These Contract Monitoring Reports (CMR) are functionally surveys of the end users sent to all Program Managers named in a contract. Review of these CMRs allows us to specifically identify and reach out to individuals who have had positive or negative experiences with the vendor and address their feedback directly. This process informs our agenda and allows us to focus on vendor strength and weaknesses in a collaborative way.

In a post-pandemic landscape, virtual meetings have become the norm. ASBRs can certainly be conducted remotely and have been in some cases. That said, CPS has found that many vendors are willing – and even enthusiastic – to attend an in-person meeting. Much of the programming is led by vendors who are pleased to share their project successes and challenges, market changes and new innovations. When possible, CPS believes having an old-fashioned face-to-face meeting for this purpose to be preferable.

Michigan is more than willing to share the work it has done in developing their own program. ASBRs can be tailored to meet the needs of an individual state, but the general process is likely to be very similar throughout. Frankly, many of the same types of vendors are likely to be common amongst the various jurisdictions.

Service Improvement

The CPS administers 850+ contracts with a cumulative \$3B annual spend. Despite having a highly trained and capable staff, making sure these contracts perform up to expectations is a massive lift. ASBR's are another tool at our disposal.

² See Exhibit A

A common complaint held by multiple agencies utilizing a waste removal contract was inconsistent in invoicing; they generally did not meet the specifications established for certain locations. This led to frustrations from the agency, and delinquent payments to the vendor.

After conducting an ASBR we ended up hosting a presentation to stakeholder agencies, during which the vendor had an opportunity to answer questions and clarify their process, as well as promote their services with agencies that had low use of the vendor's contract. Since the ASBR was held in February 2024, we've received zero complaints from the vendor or agencies.

Savings & Efficiency

Cost savings are not a primary goal of ASBRs, but this does not mean that tangible financial benefits are not realized. In fact, CPS has found that frank discussions around potential efficiencies are a fertile area for collaboration. CPS has experienced an almost universal willingness to share efficiencies that may save the State money (at the expense of the vendor's bottom line).

At first, this appears counterintuitive, especially since pricing concessions are negotiated during these meetings. ASBRs provide an opportunity to discover and mitigate waste, which saves both parties time and money. ASBRs are the perfect opportunity for a vendor to specifically, directly, and candidly discuss efficiencies and ways they see the state wasting time, money, and resources. This does not occur in a transactional relationship, where a vendor may fear upsetting the people they work with closely by speaking frankly about waste. When an ASBR was conducted with a waste removal vendor, CPS learned of many ways the Department of Natural Resources (DNR) could realize savings and efficiencies by right sizing and prioritizing usage and quantity of their dumpsters at state parks.

Savings and efficiencies are an inevitable consequence of devoting efforts to having frank dialogues with both our vendors and agency stakeholders; that is the essence of the ASBR. It has become clear that in a transactional relationship, role confusion is a virtual certainty. ASBRs allow us to clarify responsibilities and adjust as needed. When done correctly, the State's responsibilities are better clarified and streamlined, and the Vendor can save on operational costs and pass the savings onto the State or reduce or avoid price increases.

Conclusion

Public sector supplier relationship management requires a delicate balance of the need for transparency, fairness, quality and efficiency. This is where the ASBR practice is born, and why it is so valuable. It is critically important to set and temper expectations with vendors before these meetings.

In the end, these meetings have helped us become better partners, gain valuable insights into the subject matter of our contracts, facilitated healthy communication between our agency customers and our vendor community, and helped our vendors understand State procedure and policy. You can get a competitive advantage, even in public procurement.



Vendor Annual Business Review Meeting
(Central Procurement)

Meeting Attendees (as needed):

State of Michigan:

Supplier Relationship Management (SRM)

Central Procurement Management (Procurement Director, Category Director/s)

Contract Administrator (Buyer)

Agency's identified stakeholders (optional)

If IT Contract:

Business Relationship Management

General Manager

Deputy IT Director

Vendor (existing/current Vendors with current Contracts only):

Senior leadership

Account Manager

Account Director

Frequency/Cadence:

Annually, preferably aligned with the Contract Term where possible, unless a contract is expiring, and a re-bid situation is a potential. If a re-bid situation is expected, an Annual Business Review will not be held within the 6 months prior to the rebid start date.

Format:

Vendor developed presentation is strongly encouraged.

The meeting will have two parts: vendor-led presentation/discussion and State-provided feedback.

Goals:

- Building/improving relationship between SOM and the Vendor, facilitated by Supplier Relationship Management
- Better understanding of the industry trends, where Vendor can provide an insight, as pertains to the current contract/s' activities.
- Identify mutually beneficial improvements in the existing Contract/s

Sample topics for discussion:

1. Opportunity for Vendor to discuss any relevant developments in the industry, focusing on innovation in and improvement of currently contracted services. *(Vendor-led, the State will provide feedback)*

2. High level planning of current contract activities for the duration of the Contract/s, discuss any anticipated changes that can impact the Contract/s activities. *(Vendor-led, the State will provide feedback)*
3. Vendor to discuss the accomplishments and high points of the year in review: in which areas of the business did the partnership demonstrate improvements and how these improvements can be sustained or maximized? *(Vendor-led, the State will provide feedback)*
4. Vendor to discuss potential efficiencies in the existing contract where changes may benefit both vendor and the State/Agency, resulting in better cost efficiency, improved services, or easier delivery of service by the Vendor. *(Vendor-led, the State will provide feedback)*
5. Review/clarify any State responsibilities by the Vendor (where any questions/concerns).
6. Discuss any areas of risk and mitigating factors *(both Vendor and State will discuss perceived areas of risk)*.
7. Review of spend / volumes and identify areas where future mutually beneficial opportunities can be realized *(both Vendor and the State will discuss the spend/volume)*

NOTE: Topics of discussion MUST exclude any open or upcoming bids/evaluations the Vendor is participating in, as well as any discussions of SOM strategic direction, not currently available to the public.

Participating Agency/s should bring up any issues they would like to have resolved with the vendor to SRM prior to the meeting. SRM will decide, if such issue will be discussed at the Annual Business Meeting or if a different approach is beneficial.

Guidelines for Vendor selection for Annual Business Review

- Focus will be given to vendors, with contracts supporting the State's strategic objectives
- Level of spend, risk and use by Agencies

Vendor with multiple contracts and multi-agency Contracts

- If there are more than one contract that the Vendor has with the State of Michigan, the agenda will specify which contracts will be discussed at the meeting, so the Vendor can prepare accordingly. The meeting may include one or multiple contracts, which will be determined at the discretion of the Central Procurement.
- If a Contract is with more than one Agency, Supplier Relations will consult with all involved agencies' directors or deputy directors regarding their participation in the meeting and, based on spend, usage or risk of the contract and in consultation with the Enterprise Sourcing, will select the participating Agencies.



State of Michigan

Department of *Technology,*
Management, and Budget Central
Procurement Services

2025 George Cronin

Awards for Procurement Excellence

Evaluating with Confidence: How to Swim in a Bigger Prequalification Pool

Executive Summary

Prequalification contracts are critically important as there are always projects on the horizon, where the general need may be known, but not the specifics. Prequalification contracts allow states to have contractual vehicles at the ready when these needs arise. Operational consulting is one such area where the general need is known, almost all large-scale improvement or modernization projects undertaken by a large organization utilize these services.

Finding the right fit for the right project adds a layer of complexity, because prequalified programs do not always produce the field of contractors needed. Some vendors in this space hold themselves out as generalists, with expertise in virtually every discipline. Others embrace their specialties and hold themselves out as the leaders in their specific area of expertise. How can one pre-qualification program cater to such a diverse area as operational consulting?

Central Procurement Services (CPS) believes we've found an optimal solution to this dilemma. The approach took initial inspiration from two different Federal procurement processes; down-selecting (narrowing down a list of contenders) and video proposals. The result is a robust prequalification program methodology, established using new procurement methods which greatly reduced the tier 1 solicitation time while allowing us to meet the varying needs of our agencies without compromising quality.

Innovation

The uniqueness of the program started with the solicitation itself. It included the general or tier 1 statement of work and the contract terms, including insurance and data security requirements. Anticipating a large pool, CPS made clear to potential bidders that accepting these documents without redlines was required; to ensure consistency across all the contracts, there would be no negotiations in these areas.

Michigan then used a multi-step evaluation process once proposals were received. The first step of the evaluation process was based solely on the *Vendor Questions Worksheet*, a document in the solicitation package that requires the vendor to provide information on their history, financial stability, and referenced experience, among answers to other required questions. Experience was rated on a 5-point scale; scores of 3 or higher passed and moved on to the second step.

The second phase of evaluation was consisted of live video presentation. The reduced bidder pool (36 out of the initial 42) was provided guidelines of what to present; a brief narrative on what the company is about, response to a case study provided by the State 48 hours prior to the scheduled presentation, further explanation of one of the two non-State of Michigan experiences provided in the Vendor Questions Worksheet, and question and answer time. The oral presentations were scored immediately after the oral presentation with no more than 5 minutes to come to an agreement on the confidence ratings of High, Medium, or Low. Bidders scoring with High or Medium were eligible to receive a contract.



Confidence ratings are a gut-check whether the vendor can meet the needs of the State. This evaluation team consisted of 10 state employees representing CPS, agency procurement, agency program users, and agency support services. This process ensured efficient use of these individuals time and allowed the evaluation of a large vendor pool.

Transferability

Fundamentally this is a procurement methodology any state could implement. The first step should be developing the solicitation materials, including an applicable case study and a clear explanation of the process for potential bidders. The solicitation is done via a relatively simple RFP. Then the evaluation team can go through the down-scaling step, experience could be used at this stage for many types of solicitations, but other criteria could be used as well.

A key piece to maximize time savings is ensuring that all vendors accept and agree to the same terms, insurance and security requirements, and the base statement of work. This works best if there is a large pool of bidders and lots of competition in the market. It also requires commitment from those involved not to make exceptions.

With the pool narrowed, oral presentations or video submission are conducted and evaluated via confidence rating. Both should be permissible unless prohibited by a state's laws. With the vendor pool in place, the process for Tier 2 SOW issuance to proposal receipt is quite simple.

Not only should this process be transferable to any state utilizing an operational consulting prequalification program, but it is also transferable to other prequalification programs. The process will likely require some tailoring depending on the underlying industry, but Michigan looks forward to applying these efficiencies elsewhere going forward.

Service Improvement

Two primary service improvements have been realized: faster time to contract and a larger vendor pool that is able to meet the wide range of operational consulting needs of the state.

One of the main advantages of prequalification contracts is the speed in which a specific need can be addressed. Even so, the development of the prequalified vendor pool is often a time-consuming process. By utilizing this improved methodology, we were able to establish a substantially larger and broader vendor pool in a fraction of the time.

Utilizing this method, we also right sized the number of vendors within the pool to better fit the needs of our agency customers. We believe that an expanded pool is an improvement in several ways, it increases competition during the second-tier process and can drive lower pricing. More candidates also increased the range of consulting expertise, resulting in vendors with a greater diversity in experience. With better fits and better pricing, we anticipate increased utilization of the program and a decreased need for potentially duplicative solicitations.

Savings & Efficiency

Michigan recognized great time savings in the solicitation development, evaluation, and time to contract process. There were 42 bidders in the initial evaluation pool. Using the first-round methodology, it only took 6 hours to review all bids! When compared to a more typical review rate of one hour per response for a typical solicitation, this is an 86%-time savings. 36 bidders moved on to the oral presentation stage, and only 12 hours (20 minutes per bidders, 15 for the presentation and 5 minutes for evaluation) were used.

The anticipated time to evaluate this large of a vendor pool would be between 39 – 60 hours. Utilizing this improved methodology, Michigan reduced the total evaluation time to 18 hours, thus realizing 54% to 70% efficiency for this two-phased evaluation process. Beyond this dramatic efficiency, one must also consider the substantial difficulty in coordinating and reserving the time of all the evaluators. Any reduction here is invaluable; freeing up between 21 and 42 hours (over 2 ½ to 5 business days!) is remarkable.

This obviously leads to quantifiable savings in labor costs. With a total number of 10 evaluators, this represents \$10,000-\$20,000 in administrative savings on wages alone for a single prequalification evaluation. (The average hourly wage of these JEC members was \$47.09, for a total hourly cost of \$470.90.)

Increased competition at the second tier-level is also expected to result in cost avoidance and even hard savings.

Conclusion

Prequalified vendor programs are often popular because of the speed with which they can be utilized. Ironically, the programs themselves can often take a long time to set up. By utilizing downscaling, live video presentations, and eliminating red-line terms negotiation, this does not have to be the case. Along with this efficiency, you also end up with more competition and better pricing, while increasing program utilization and decrease duplicative solicitations.





State of Ohio

Department of Administrative Services
Office of Procurement Services

2025 George Cronin Awards for Procurement Excellence

Tracking and Trimming RFP Timelines

Executive Summary

The Office of Procurement Services of the Ohio Department of Administrative Services (DAS) launched a strategic initiative to significantly reduce the duration of the Request for Proposals (RFP) process — particularly for IT-related procurements, which historically averaged over one year to complete. These lengthy durations hindered state agencies' ability to deliver essential public services. The initiative set an ambitious target: cut RFP duration to six months or less from solicitation to award (i.e., the time from DAS performing its final review of the solicitation to approval of a contract award).

DAS commissioned a multi-agency Kaizen event to analyze the process, identify delays, and implement data-driven reforms. Solutions included leveraging the state's e-procurement system, OhioBuys, for project tracking features and developing real-time Tableau dashboards to monitor performance. The result: a 52.8% reduction in average IT RFP duration — from an average of 322 days to 152 days.

Other Key Results:

- Expansion of the initiative to include non-IT RFPs
- Accelerated delivery of citizen-facing services (For example, a 121-day RFP award supporting the Ohio Department of Health's long-term care facility management system)
- Stronger stakeholder collaboration and perception of procurement as a strategic partner
- Dashboard-driven transparency driving behavioral and operational change

This project exemplifies innovation in procurement, demonstrates scalable transferability, improves internal service delivery, and yields measurable efficiency gains — fulfilling all core criteria for the Cronin Award.

Innovation

This project stands out for its holistic, cross-functional approach to reengineering a critical but extended procurement process and for its ability to advance the procurement profession. By applying Kaizen methodology to the public procurement process, DAS introduced a new way of thinking about collaboration, ownership, and transparency in state contracting for IT and non-IT goods and services.

Key Innovations include:

- Development of custom Tableau dashboards that aggregate real-time data across projects



- Use of OhioBuys tracking templates to create project timelines, standardize milestone visibility, and flag delays
- Shift in culture and accountability, with agencies co-owning outcomes alongside DAS
- Establishment of firm, transparent negotiation timelines, improving predictability for suppliers.

A standout feature of the initiative was the introduction of step-level tracking within OhioBuys project plans. This structured approach mapped each RFP to a consistent set of milestones, with assigned task owners and expected due dates. Even when specific tasks — such as legal reviews or evaluations scoring — are performed by other stakeholders, their timing and responsibilities are clearly defined within the overall project timeline. This ensures continued momentum and shared awareness of each project's status.

This initiative was not simply a technological upgrade but also achieved a transformative shift in expectations. The tracking templates improve visibility while encouraging more engaged participation from stakeholders. With clearly defined steps and timelines, agencies have become more accountable for their contributions, and delays are easier to identify and address collaboratively. The process is now seen less as a sequence of handoffs and more as a coordinated effort, jointly managed by DAS and its partner agencies to meet shared goals and deliver timely, high-quality procurements.

Transferability

The initiative is highly transferable and applicable across jurisdictions facing long procurement timelines and challenges with stakeholder engagement. In fact, the process already has proven transferable: after early success by IT procurement, the non-IT procurement team adopted the same approach, establishing their own RFP timeline, process, and dashboard.

- The framework is modular, using commonly available tools like project plans and dashboards.
- The principles of Kaizen, milestone tracking, and data transparency are universally relevant and do not rely on Ohio's geography or legal structure.
- Other states can adapt the timeline reduction strategy regardless of their procurement systems by:
 - Mapping their RFP process
 - Identifying ownership gaps
 - Establishing standard project plan templates
 - Embedding performance dashboards and tracking mechanisms



Although specific implementations may differ, the core methodology — process analysis, shared accountability, leadership buy-in, and performance monitoring — is easily adaptable and scalable to any state or public-sector entity.

Service Improvement

The project significantly enhanced internal service delivery and stakeholder satisfaction.

- Faster turnarounds have enabled agencies to execute mission-critical projects on schedule. (For example, non-IT Procurement's rapid execution of a media buying RFP in 99 days for a health campaign.)
- Stakeholder engagement increases through:
 - Participation in the Kaizen event
 - Regular updates via dashboards
 - Assignment of RFP project tasks, such as conducting reviews or evaluations of proposals, to establish clear accountability for team members.
- DAS' customers now view the process as transparent and collaborative, rather than unclear or bureaucratic.
- Project plans and tracking mechanisms allow stakeholders to provide regular updates on assigned tasks.
- Dashboards highlight task owners and delays, improving clarity and responsibility.

The project removed significant bottlenecks in the IT and non-IT procurement processes, resulting in DAS affirming itself as a trusted advisor and partner for agencies' ability to strategically execute their procurement of goods and services. The enhanced collaboration also has built internal momentum to maintain and improve service delivery standards beyond the scope of this initiative. As a result of this initiative, the cycle time for IT and non-IT RFPs has been reduced significantly and transformed to enable routine execution within a six-month period (i.e., the time from DAS performing its final review of the solicitation to approval of a contract award).



Savings and Efficiency

The initiative produced measurable efficiency gains and supports future cost avoidance.

- RFP cycle time for IT Procurement reduced by 52.8%, from an average of 322 days to 152 days.
- Quicker procurements reduce the cost of delays in delivering services and enable the State of Ohio to capitalize on supplier pricing being offered.
- Standardized tracking processes prevent time loss to miscommunication or poor visibility.
- Project portfolio oversight helps leadership prioritize bottlenecks proactively

While exact dollar savings vary by project, systematic improvements significantly reduce staff time, wasted effort from redundant reviews or unclear ownership, and opportunity costs. Furthermore, the project supports long-term operational efficiency by enabling better forecasting, planning, and stakeholder alignment.

Conclusion

Ohio's initiative to reduce RFP timelines offers a model of public procurement transformation that blends technical solutions and behavioral change. It demonstrates how state governments can use transparency, shared accountability, and leadership commitment to achieve meaningful reform.

This effort did more than speed up processes — it accelerated public service delivery, strengthened supplier relationships, and elevated the procurement profession within the state. Most importantly, it proved that bold goals and collaborative execution can yield tangible, replicable results.





State of Tennessee

Department of General Services

Division of Central Procurement Office

2025 George Cronin

Awards for Procurement Excellence

Beyond the Storm: Optimizing Crisis Response through Collaboration for Emergency Procurement Strategies

Executive Summary

On September 27, 2024, Hurricane Helene struck Tennessee as a tropical storm. While most of the news media attention was on Florida and North Carolina, Tennessee was deeply affected by Hurricane Helene in numerous counties in Northeast Tennessee. Northeast Tennessee experienced widespread damage, with property damage being valued at a quarter of a billion dollars. The extreme flooding and damage to infrastructure prompted the Central Procurement Office and the Tennessee Emergency Management Agency (TEMA) to think outside the box in how to respond and best serve citizens affected, resulting in the State identifying two procurement priorities for this response: (1) developing an emergency debris removal Statewide Contract (“SWC”) by merging three existing procurement methods; and (2) updating the emergency-specific grant authority process.

Innovation: Tennessee adapted the standard Informal Quote, Invitation to Bid (ITB), and the Emergency Purchasing Authority processes to preserve competition while expeditiously creating an emergency debris removal SWC. Lacking a SWC for debris removal, and knowing a full competitive RFP wasn’t feasible under these constraints, we collaborated to innovate a competitive process - rather than direct awards - to meet the moment and also ensure transparency and protect taxpayer dollars. The responses confirmed our belief that a new, fast, competitive process was beneficial. In addition to the substantial cost savings, the awarded vendor is a woman-owned business, allowing the State to count the spend toward its diversity goals.

The State is often tasked with distributing emergency grant funds to the affected communities in a prompt and efficient manner. We introduced an updated Delegated Grant Authority (DGA) model and Rule Exception Request (RER) process for TEMA use to efficiently distribute emergency grant funds on an expedited schedule. *(The DGA Model can be found on Attachment A)*

Transferability: Each state may proactively identify existing competitive procurement and grant administration processes that can be adapted to meet emergency needs when the inevitably arise in the future.

Service Improvement: Our efforts resulted in shorter turnaround times, which expedited the recovery process and provision of aid. In our case all emergency contracts needed to be finalized by Christmas 2024 to meet internal review deadlines and ensure timely implementation within Tennessee’s state of emergency activation status window. To properly procure these services in a State of Emergency, we leveraged all available resources, including the NASPO discussion board, sister State agencies, and our colleagues in neighboring states who already had contracts in place for similar services. Using collaborative information and resources, we developed a scope of work tailored to Tennessee’s needs.

Savings and Efficiency: The new processes created by the State resulted in measurable savings of approximately \$150M, while also shortening turnaround times as noted above. Previously, RERs often had to be submitted after the fact, creating further delays. By proactively integrating exceptions and approvals into the new DGA model at the front end, the need for reactive fixes has been significantly reduced. *(Please reference Attachment B for cost savings.)*

The key takeaway: Tennessee’s this approach to the State of Emergency caused by Helene enabled the State to be more proactive, not reactive, enhancing both efficiency and fiscal responsibility in emergency grant distribution and procurement.

Innovation

Even under an emergency declaration, maximizing competition is always preferred. As responsible stewards of taxpayer funds, we aimed to ensure high-value services at a reasonable cost, especially given the scale of the spending. To incorporate competition within the constraints of the emergency, we modified the

State's existing Informal Quote process to solicit pricing for Debris Removal Services. Rather than relying solely on TEMA's emergency purchasing authority, a CPO emergency purchase request was strategically used to establish a statewide contract instead of an individual agency contract, promoting greater transparency and oversight in the procurement process. The Informal Quote is typically used for procurements valued between \$25,000.00 and \$100,000. Procurement professionals seek three quotes from suppliers based on a defined project scope or product specification and award to the lowest quote received. Treating the Informal Quote like an invitation to bid with a high dollar threshold allowed us to obtain competitive quotes while also moving quickly in order to meet pressing needs.

The State's grant process did not already have a method that would allow the State to quickly distribute the urgently needed funding. The existing TEMA DGA model did not provide any provisions that would allow the agency to expedite the process. A DGA provides a State Agency the authority to execute grants for an individual program within specified limits and guidelines. However, in every state, obtaining the required approvals for this type of grant contract can be a protracted process. In our case in 2011, a special DGA model was approved by the State's Procurement Commission in order to assist TEMA in issuing contracts for federally declared emergencies. However, this didn't cut down on the required approvals to establish the DGA. Among other reasons, RERs would be required when the DGA term is greater than twelve months when the funding source isn't exclusively federal, when the maximum liability exceeds ten million dollars (and individual contracts greater than five million dollars), and when shortening the processing time to less than thirty days before a grant's start date - all cases that would commonly apply to proposed emergency grant programs. The TN CPO, in collaboration with the Comptroller of the Treasury and TEMA, came up with the solution to update the existing model by writing in exceptions to administrative requirements and including pre-approved terms specific to TEMA. First, we identified the bottleneck areas of the grants process as well as some redundancies that could be bypassed in order to pave the way for an expedited process. The most significant challenges encountered were delays caused by extended approval timelines and the time-intensive nature of the process. Furthermore, the existing model proved inadequate, as it lacked notable information required for accurate and efficient execution. As a result, we sorted out language that would make TEMA exempt from such requirements when utilizing the new model for emergency grants. This innovation has allowed TEMA to more quickly distribute emergency grant funds to the affected areas. This updated process will save the State an estimated 10 business days between an emergency grant's submission and its execution.

Transferability

Though Tennessee and our region are at risk for different natural disasters than other states, all states have their own risks and could stand to benefit from the procurement innovation that we have developed and implemented.

Utilizing an Informal Quote purchasing procedure in coordination with an Emergency Purchasing declaration is easily transferable to any federal, state or local government. Most governmental entities already utilize both purchasing methods. Each governmental entity should review their purchasing procedures to determine what their Informal Quote thresholds are and what guidelines they have surrounding Emergency Declarations.

Distributing emergency grant funding isn't an uncommon occurrence at the federal, state, or local levels of government; however, how this is done varies widely. The adaptation of an existing model to remove as many administrative requirements as possible is something that can be done immediately when it comes to grants management in order to prepare for future emergencies. Each entity should review their emergency grants process to identify areas that could be expedited by providing either a blanket exception to lessen administrative requirements or implementing new policies or procedures that would have the same effect. Importantly, this is not a capability limited to a single agency or jurisdiction; any state can adopt this approach. Success depends on creating a dedicated internal team willing to critically review current procedures, advocate for necessary changes, and implement policy or process improvements.



Service Improvement

Due to Hurricane Helene, numerous children, families, and community members were left in desperate need of quick, comprehensive action to provide them with the basic necessities. The RFP process typically takes 120 business days from development to award, but our communities needed debris removal services faster.

For our Debris Removal Informal Quote, Tennessee's long-standing efforts to break down silos and foster cross-agency and external collaboration was a key component of this effort's success. Partners from five different State agencies came together to help finalize the requirements prior to its release. TEMA has operated collaboratively for nearly 46 years due to their use of State agency Emergency Service Coordinators (ESCs), which are liaisons between TEMA and their respective agency - eyes on the ground to give us the full impact of what was happening. Without the connections to other State agencies that we developed through TEMA's ESC program we would not have done enough up front work to ensure the project would have been successful.

To develop our specifications we engaged in extensive collaboration, utilizing resources available to us such as the NASPO discussion board to obtain examples of debris removal contracts from other States. We contacted our colleagues in the Emergency Management Agencies of Florida and South Carolina to learn more about the type of work and to have benchmarking material to begin crafting our scope of work. Second, we identified suppliers active in the debris removal industry. We partnered with numerous agencies to ensure the success of the project. For instance: the Department of Commerce & Insurance to determine the licensing requirements, Finance and Administration's Supplier Maintenance division to ensure potential suppliers were registered in the State's ERP system - we would have failed to meet our federal timeline requirements if not for these colleagues. The Department of Environment and Conservation ensured proper regulatory requirements were in the project scope requirements. Support from NASPO colleagues allowed us to successfully benchmark our scope work. TEMA helped ensure the needs of the local communities impacted were considered.

Once we had a qualified supplier pool and a finalized scope of work, we issued the Informal Quote Request. Suppliers were asked to provide pricing per cubic yard, based on debris type and destination - aligned with our needs and facilitating contract monitoring and management. We also held a brief Q&A period to ensure clarity and promote strong, comparable quotes.

In the end, we condensed the process to just 20 business days using our modified Informal Quote approach, reducing the time required by over 80%. This accelerated method not only ensured compliance with federal deadlines but also enabled us to deploy services to affected areas far more quickly than a traditional RFP would have allowed. Within those 20 days, we identified suppliers, registered and licensed them in Tennessee, finalized a scope of work, developed an evaluation model, conducted a pre-response conference and a Q&A period, ran the solicitation, and executed contracts. In emergency procurement, success hinges on teamwork, mission-driven focus, and clearly defined responsibilities - all of which were critical to delivering this project under such tight timelines.

There was also an urgent need for disaster grants to start being distributed to the affected communities. It typically takes agencies at least a couple weeks to prepare the necessary documentation for a grant to be submitted for approvals. Once submitted, it can take anywhere between three to six weeks for a grant contract to be executed. In total, a typical grant may take months until it is fully executed. Within this, it typically takes five to seven business days for RERs to obtain full approvals. This is in addition to the two to three business week turnover rate for DGA contracts to receive full approvals. If a State Agency neglected to include any applicable RER in their submissions, it only adds more time to the process which further delays the distribution of grant funds. This puts a significant strain on the emergency grant process. In one case, an extra 41 days were added to the approval process so TEMA could obtain these administrative exceptions. The new TEMA DGA model waives these administrative exception requirements and limits the



required exception requests to those applying to any changes in the standard language of the State's grant models. Implementing this new model has saved us an estimated total of at least ten business days, which will allow TEMA to more quickly provide aid to the affected areas.

Like emergency purchasing, the key to success is the continued relationship among business partners. Without the collaboration and effort put into this project by all state agencies involved, we would not have been able to identify as many areas of contention nor would we have been able to offer as many solutions.

Savings & Efficiency

Given the scale of the disaster, we anticipated debris removal costs could exceed \$500 million. The implementation of both the Informal Quote process and the updated TEMA DGA model resulted in substantial cost savings for the State of Tennessee.

Informal Quote Process: Through an informal quote process, the State achieved significant cost savings that are rarely possible during a state of emergency. Rather than defaulting to the first responder - which often limits flexibility (and establishes the buyer as a price-taker) - the State obtained three quotes, allowing for price comparison and greater control over contract terms. The highest quote received totaled \$438,506,935, while the lowest came in at \$289,389,530 - a savings of \$149,117,405, even before considering the downward pressure on pricing created by holding a competitive event in the first place (see *Attachment B*). This approach avoided time-consuming negotiations and led to the selection of a local supplier, an additional benefit. A backup supplier was also secured, ensuring both speed and reliability.

TEMA DGA Model: Originally, the cost per process under the original method would have been \$6,497.37 per transaction. With the new, streamlined approach, that cost was reduced to \$2,165.79 - a reduction of approximately 67%. This yields additional savings of \$4,331.58 per DGA, accounting for reduced administrative overhead and expedited processing. These savings reflect cost avoidance not just in direct expenses, but also in staff time and delays associated with RERs (see *Attachment C*).

In addition to the clearly quantifiable savings, the new processes have also led to cost avoidance that is more difficult to measure but equally impactful. These savings stem from minimizing the risk of: administrative errors, delayed approvals, redundant submissions and, unexpected RERs. By front-loading requirements and proactively addressing potential bottlenecks, the State has avoided numerous hidden costs that often arise during emergency procurement and grant distribution. These include additional staff time, legal review, missed federal deadlines, or extended service delays. While these costs are hard to quantify, they represent a significant source of operational efficiency and financial stewardship. The updated processes ensure smoother execution, reduced backtracking, and a stronger foundation for future emergency response efforts.

Conclusion

The State of Tennessee's response to Hurricane Helene demonstrated innovation, collaboration, and fiscal responsibility under extreme emergency conditions. By leveraging the Informal Quote process and revising the TEMA DGA model, the State expedited critical services and funding while achieving substantial cost savings and administrative efficiencies.

These efforts not only ensured compliance with federal deadlines but also protected taxpayer dollars and improved service delivery. Importantly, the proactive, cross-agency collaboration and process improvements offer a transferable model for emergency procurement and grant management teams. Tennessee's approach proves that even under crisis, thoughtful planning and strategic partnerships can drive effective, sustainable solutions.



Attachment A: Before vs After DGA Template Instructions

7/1/2011 7-1-11 TEMA-DA

TEMA-DA MODEL

This model prescribes the format and content for a Tennessee Emergency Management Agency Special Delegated Authority relating to a specific federal or state declared disaster (approval of which confers delegated authority to make agreements as specified without additional, individual, independent approval).

Documents of this type must adhere to this model with revisions only as instructions permit. Insignificant deviations from this model, while always subject to disapproval, will, typically, not require a specific rule exception unless an oversight examiner requires separate documentation in a particular instance. If a formal rule exception request is not required, oversight approval of the document will constitute selected rule exception(s) as may be necessary.

Substantive changes reflected in this model [from the superseded version] include revisions of:

- selected summary cover fields

Complete form fields and follow, replace, or otherwise address red instructional text (e.g., State Agency Name, amount, will/will not) as indicated and with conforming font and color.

Complete summary cover fields as indicated within the template and the following field directions.

Agency Tracking #	unique tracking number comprised of: 5-digit business unit # ± unique, 5-digit # example: 31707-12345
Funding	amounts by fiscal year and funding source with row and column totals; contract maximum liability MUST equal the sum of the TOTAL Contract Amount column (i.e., the grand total amount for all fiscal years & all sources of funding)

A summary cover sheet properly completed and in accordance the model is required for every copy of the contracting document.

Affix the contracting agency head certified or authorized signature. Prepare the Contract Entry Record for the delegated authority as required by the Edison system. Then, scan the signed document with the completed summary cover to a PDF file and attach the digital copy to the subject Edison record.

Attach any supporting documentation in PDF format to the subject Edison record including, as applicable, the following:

- a PDF copy of the previously approved delegated authority if a delegated authority with the same purpose similar to one proposed was approved in the prior year
- a PDF copy of any associated rule exception

Submit the Edison Contract Entry Record with the proposed document for approval routing.

A delegated authority will ONLY be approved for a period of either all or some part of one (1) fiscal year. However, it may specify a contract period of up to 5 years for any contract entered pursuant to the delegated authority.

Do NOT route a delegated authority for approval after its begin date. (Any delegated authority routed for approval after its begin date is subject to disapproval or may be approved with a begin date later than the one proposed.)

3/5/2025 03.05.25 TEMA-DGA

TEMA-DGA MODEL

This model prescribes the format and content for a Tennessee Emergency Management Agency ("TEMA") Special Delegated Authority.

This TEMA-DGA model is for TEMA use only. Once approved, this delegated authority authorizes TEMA to execute individual grant agreements relating to a specific federal or state declared disaster. Approval of a TEMA-DGA confers delegated authority to make agreements as specified without additional, individual, independent approval.

Insignificant deviations from this model, will, typically, not require a specific rule exception unless an oversight examiner requires separate documentation in a particular instance.

Complete form fields and follow, replace, or otherwise address red instructional text (e.g., State Agency Name, amount, will/will not) as indicated and with conforming font and color.

Complete summary cover fields as indicated within the template and the following field directions.

Agency Tracking #	unique tracking number comprised of: 5-digit business unit # ± unique, 5-digit # example: 31707-12345
Funding	amounts by fiscal year and funding source with row and column totals; contract maximum liability MUST equal the sum of the TOTAL Contract Amount column (i.e., the grand total amount for all fiscal years & all sources of funding)

A summary cover sheet properly completed and in accordance the model is required for every copy of the contracting document.

Affix the contracting agency head certified or authorized designee signature. Prepare the Contract Entry Record for the delegated authority as required by the Edison system. Then, include the signed document with the completed summary cover to a PDF file and attach the digital copy to the subject Edison record. Attach any supporting documentation in PDF format to the subject Edison record as applicable. Submit the Edison Contract Entry Record with the proposed document for approval routing.

If federal funds are involved, TEMA should review the notice of award and ensure all applicable time frames and terms are included.

The Delegated Authority may specify a contract period of up to sixty (60) months entered pursuant to the delegated authority. A Rule Exception Request is not required for a begin date prior to TEMA-DGA approval as long as the Edison record includes justification regarding Federal Pre-Award Authority.

Attachment B: Informal Quotes Evaluation Model

Operational Area	Informal Quotes Received		
	Crowder Gulf	PNJ	AshBritt
Area 1	\$106,311,515.00	\$64,337,506.00	\$106,130,012.00
Area 2	\$106,709,015.00	\$65,777,506.00	\$106,587,512.00
Area 3	\$53,324,015.00	\$32,699,756.00	\$53,317,512.00
Area 4	\$138,262,765.00	\$93,875,006.00	\$105,901,262.00
Area 5	No Bid	\$32,699,756.00	\$66,570,637.00
Grand Totals	Lowest Bid	Awarded Supplier	Back-Up Supplier
	\$404,607,310.00	\$289,389,530.00	\$438,506,935.00

Attachment C: DGA Cost Analysis

Min. DGA Cost	Max. DGA Cost
\$1,558.69	\$2,772.90
Average DGA Cost	
\$2,165.79	

TEMA DGA Approval Process

Cost Analysis Per Transaction

Step #	Process Description	Job Title	Time Lapse	Minimum Time Spent	Maximum Time Spent	Category Specialist \$	Reimbursement	Total Salary + Benefits	Minimum Cost per Step	Maximum Cost per Step
1	Generate	EMER MGMT SPECIALIST 3	3 HRS	3	3	\$71,280.00	1.36	\$96,940.80	\$149.14	\$149.14
2	Initial Review by Manager	EMER MGMT ADMINISTRATOR 3	2-3 HRS	1	1.5	\$124,548.00	1.36	\$169,385.28	\$86.86	\$130.30
		TEMA CHIEF OF STAFF		1	1.50	\$179,256.00	1.36	\$243,788.16	\$125.02	\$187.53
3	Legal Review	GENERAL COUNSEL 2	7.5-15 HRS	7.5	15	\$182,364.00	1.36	\$248,015.04	\$953.90	\$1,907.81
4	Entering into Edison	EMER MGMT SPECIALIST 3	0.5- 0.75 HRS	0.5	0.75	\$71,280.00	1.36	\$96,940.80	\$24.86	\$37.28
5	Approval in Edison	DGS-CPO-Grants	2.75-4.5 HRS	1	1.5	\$87,576.00	1.36	\$119,103.36	\$61.08	\$91.62
		DGS-CPO Level 2		0.25	0.50	\$135,960.00	1.36	\$184,905.60	\$23.71	\$47.41
		DGS-CPO Level 3		0.25	0.50	\$197,700.00	1.36	\$268,872.00	\$34.47	\$68.94
		COT		1	1.50	\$133,128.00	1.36	\$181,054.08	\$92.85	\$139.27
		DGS-CPO		0.25	0.50	\$38,988.00	1.36	\$53,023.68	\$6.80	\$13.60



TM